



Travelers' Philanthropy Handbook

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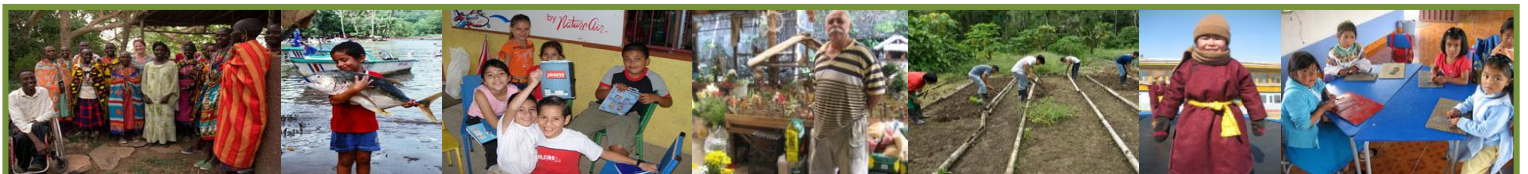
Center for Responsible Travel

Edited by
Martha Honey

Washington DC Office:
1333 H Street, NW Suite 300E
Washington, D.C. 20005
Tel: 202-347-9203

www.responsibletravel.org
www.travelersphilanthropy.org

Stanford University Office:
450 Serra Mall, Building 50, Room 51D
Stanford, CA 94305
Tel: 650-723-0894



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Acknowledgements

The idea to do this *Handbook* was born at the December 2008 International Travelers' Philanthropy Conference in Arusha, Tanzania. We at the Center for Responsible Travel (CREST) collaborated with Basecamp Foundation, one of our main partners for the Arusha conference, in putting together the outline and discussing the *Handbook's* content. We are grateful especially to Basecamp's Lars Lindkvist and Judy Kepher-Gona. Their insights as thoughtful practitioners of travelers' philanthropy have been vital in making sure that the *Handbook* meets the needs of tourism businesses, communities and local organizations, and travelers. In addition, we are grateful that, with the help of Lars and his wife Wanjira, we were able to receive a wonderful Foreword from Nobel Peace Laureate, Dr. Wangari Maathai.

The *Handbook* has grown in scope and size from our original vision, as we identified more topics that needed to be included. In the end, over 30 people contributed and almost all the essays, case studies, and surveys presented here were written, or substantially revised and updated, specifically for this *Handbook*. We are pleased and honored to have so much original material from many of the leading experts in this field. We thank each of you for your contributions and your patience in dealing with various rounds of editing. Special thanks goes to Jane Crouch who contributed multiple essays to the volume, based on her expertise in developing and managing Intrepid Travel's exemplary travelers' philanthropy initiatives.

We also thank all the contributors and others connected with CREST's Travelers' Philanthropy program who gave us permission to use the photos in the *Handbook*.

CREST Co-Director Martha Honey took the lead on this project, with day to day work on the *Handbook* carried out most centrally by Whitney Cooper who continued to play an active role in its layout, even after she had left our organization. We have also been assisted in various ways by CREST Sr. Manager David Krantz and a revolving door of competent and committed interns, including Johanna Wolff, Ross Lowry, Chi Lo, Milan Gamble, Daniel Fridman, Megan Swords, Adriana Alarcon, Francisco Martinez, and Yongjoo Shin.

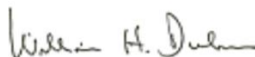
We were most fortunate, during the final months, to secure the help of Sandra Tassel, a talented writer, researcher, and editor, as well as an avid eco-traveler, who skillfully copy edited the entire manuscript, smoothing out many rough sections and rewriting several major chunks. Finally, the *Handbook* would not have been possible without the financial support of our corporate and foundation underwriters. A number of these are long time friends and collaborations and we thank you, once again, for your support. We are especially grateful to Stefan Norris of the Lennox Foundation and Raymond Gilpin of the United States Institute of Peace, both of whom promoted the *Handbook* project within their two institutions.

We hope this *Travelers' Philanthropy Handbook* will be useful to tourism businesses and associations, local and international organizations, travelers (both active and armchair), academics, governments, and others involved specifically in travelers' philanthropy and more broadly in the fields of philanthropy, responsible travel, and sustainable development.

On behalf of the Center for Responsible Travel,



Martha Honey, Ph.D.
Co-Director, Washington, DC



William H. Durham
Co-Director, Stanford University



Travelers' Philanthropy Handbook Underwriters

Our thanks to the following foundations and companies for their financial support.



THE LENNOX FOUNDATION



Read What The Experts Say About The Travelers' Philanthropy Handbook

"The Travelers' Philanthropy Handbook is the most user-friendly and comprehensive assemblage of information I've seen on how the travel industry and travelers themselves can give back to the communities they touch. The advice is practical and far-reaching and the extensive use of case studies provides insights directly applicable to travel companies of any size or specialty."

-- Kevin Doyle, Condé Nast Traveler News Editor

"This Handbook provides a thoughtful and practical grounding to the emerging nexus of travel and philanthropy. It makes an important step forward in our understanding of how best to guide travelers' well-meaning interests and the needs of host communities. This is a valuable tool for all stakeholders---across the public and private sectors---involved with tourism and development. The combination of definitions, concepts, models, and case studies provides a strong array of key information and insights."

--Hannah Messerli, Ph.D., Africa Region Private Sector Development, Tourism, World Bank

"Travelers' philanthropy is an exceptional (yet often overlooked) addition to the peacebuilder's toolkit, firstly because it offers wide ranging environmental and socio-economic benefits and, secondly, because it fosters positive global citizenship. By illustrating key concepts and strategies with effective case studies, this volume provides an easily-digestible roadmap for practitioners and an invaluable resource for scholars and policymakers. The diverse perspectives of the expert contributors to this timely publication have one unifying theme: well-planned and judiciously executed travelers' philanthropy projects can build communities from the ground up, sustainably."

-- Raymond Gilpin, Ph.D., Associate Vice President, Sustainable Economies, United States Institute of Peace (USIP)

"The Travelers' Philanthropy Handbook captures the essence of complex concepts of engaging the power of tourism to 'do good' in the world. Importantly, it communicates the enormous potential for travel and tourism to create positive change for the environment and communities. The guidance and specific examples highlight the diversity in approaches, and critical considerations to provide maximum benefits to those places and people in need. For those engaged as tour operators, education and research, and participate in travel, this timely and progressive document is an invaluable resource."

-- Kelly Bricker, Ph.D., Associate Professor, University of Utah; Chair, The International Ecotourism Society (TIES) and the Global Sustainable Tourism Council (GSTC)

"Tourism Cares' mission is to preserve the travel experience for future generations. If you share that mission, read this Handbook today. It informs, advises, cautions, warns and often challenges tourism business, NGOs, and travelers about give back programs designed to assist local communities in so many ways. Travelers' philanthropy is growing in popularity as well as purpose. This publication marks the first time that so many of the "how to's" of giving time, talent and treasure are assembled in one place. It is a must have and use Handbook for all those involved in or concerned about responsible travel."

--Bruce Beckham, Executive Director, Tourism Cares

"The case studies contained in this Handbook exemplify tourism's potential as a driving force for environmental conservation and poverty alleviation and inspire us to give something back to the people and places that we visit. When properly managed, philanthropy can be a powerful tool for magnifying the positive effects of travel and minimizing the negative. I would recommend this comprehensive publication for anyone who is interested in learning more about Traveler's Philanthropy."

--Ronald Sanabria, Sustainable Tourism Vice-president, Rainforest Alliance

"Travelers' philanthropy is increasingly recognized as a core component of responsible travel. As we work to set global environmental and social criteria for the tourism industry, it is essential that we understand how to create robust and effective travelers' philanthropy programs. This Handbook is an excellent compendium of sound practical advice and should be considered essential reading for all of us concerned about maximizing the benefits of tourism for local communities and conservation. Congratulations to all the contributors!"

--Erika Harms, Executive Director of the Global Sustainable Tourism Council (GSTC) and Senior Advisor on Tourism at the United Nations Foundation

Travelers' Philanthropy Handbook

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Foreword

**By Wangari Maathai, Ph.D.
Founder, Green Belt Movement & 2004 Nobel Peace Laureate**

When the Norwegian Nobel Committee decided to give the Peace Prize to me for our work with the environment, it opened up a new era. Throughout the history of the prize the committee had recognized that there are many ways to promote peace -- by preempting the causes of conflict, by working for human rights, by promoting justice and equity, and by advocating for greater democratic space. And in 2004, the committee recognized that sustainable management of the environment is also vital for peace. If the resources we have on the planet are not managed in a responsible way, if they are not shared in an equitable way, they precipitate conflicts and wars. And indeed when you look at many of the wars we are fighting around the globe, they are over the access, the control, and the distribution of resources. So the message that the Norwegian Nobel Committee was striving to deliver to the world was that we need to change our mindset about the resources that we have: how we manage them, how we distribute them, how we share them. And to be able to do that, we need to manage ourselves in a more democratic way. And so the Nobel Committee linked the sustainable management of resources, good governance, and peace.



Wangari Maathai helping kids plant trees.
Credit: Green Belt Movement

In a similar way, travelers' philanthropy is expanding the concept of ecotourism and its various permutations: responsible tourism, sustainable tourism, pro-poor tourism, geotourism. All these forms of tourism are grounded in sound environmental and social principles and, as such, they are challenging travelers and the travel industry as we have known it. Travelers' philanthropy, a concept and practice that has been emerging as a global trend over the last decade or two, deepens the meaning of socially and environmentally responsible travel. It posits that the travel industry and travelers should contribute in concrete ways to support the social and environmental welfare of the destinations visited and the people who live in these places.



Wangari Maathai at 2008 Travelers' Philanthropy Conference, Tanzania. Credit: CREST

The contributions of "time, talent, or treasure" produced by travelers' philanthropy are intended to be in addition to the cost of travel or the vacation package purchased by the visitor. As my good friend David Western explains, tourism is fees for service. Ecotourism is fees plus good practice, and travelers' philanthropy is this plus additional donations to the destination. It is, in essence, a form of development assistance flowing from the travel industry and travelers into local

conservation and community projects and organizations. Travelers' philanthropy expands not only the definition of responsible travel, but it also enriches the travel experience for host communities, for travelers, and for travel businesses themselves.

Like all development aid, travelers' philanthropy needs to be done well. It takes careful planning; learning from and working with the host community; building bridges and coalitions; offering a hand up and promoting empowerment, not handouts. Which is why this *Travelers' Philanthropy Handbook* is so vital. This unique and comprehensive *Handbook*, written by several dozen leaders in the field, covers the theory and practice, as well as the pitfalls and best practices, of travelers' philanthropy.

Remember, tourism, done well, can be a great vehicle for promoting peace. But we need to remember the bottom is heavy: if we don't do something about the people at the "bottom", the environment we depend on will gradually be destroyed by them as they try to sustain their livelihoods. Therefore, promoting philanthropy as part of the travel experience can help to preempt the causes of conflict by empowering communities, creating capacity, and building sustainability within the communities visited.



Participants at 2008 Travelers' Philanthropy Conference, Tanzania. Credit: CREST

Chapter 1:

Core Components of Travelers' Philanthropy

Origin and Overview of Travelers' Philanthropy

By Martha Honey, Ph.D.
Co-Director, Center for Responsible Travel (CREST)

A new source of international development assistance is evolving, in all regions of the world. Civic-minded travelers and travel businesses are giving time, labor and expertise, and financial and material resources to improve and steward the places that they visit and further the well being of the people who live in those places. This new type of assistance is supporting and empowering local and indigenous communities by providing jobs, skills, and lasting improvements in health care, education, local livelihoods, and environmental stewardship. We refer to this support as “travelers’ philanthropy.”

Travelers’ philanthropy is fundamentally about good global citizenship – enjoying, learning, and positively contributing to worthwhile community and conservation projects in tourism destinations. Through this relatively new but growing form of philanthropy, funds, supplies, services, and expertise are flowing from the travel industry and travelers into host communities. Travelers’ philanthropy generates additional resources for communities impacted by tourism, over and above tourism’s fee for service transactions.

Travelers’ philanthropy is tourism businesses and travelers making concrete contributions of time, talent, and treasure to local projects *beyond what is generated through the normal tourism business.*

Travelers’ philanthropy is not about collecting loose change for charities; rather, it is about integrating tourism company and visitor support for local communities into the core definition of responsible travel. It is also about:

- Helping tourism businesses become actively involved as ‘good citizens’ in their travel destinations.
- Assisting local projects that provide a ‘hand up’ not a ‘hand out;’ that is, projects that promote social empowerment, education, and entrepreneurship that lead to sustainable, long-term development and environmental conservation.
- Enriching the travel experience through meaningful, culturally sensitive, and productive interactions with people in host communities.

Done well, travelers’ philanthropy benefits the destination, the travel business, and the traveler.

- **Philanthropic Giving**

Philanthropy is, of course, not a new concept. It comes from two Greek words: “phil” which means “love for” and “anthrop” or “human.” *Philanthropy is an act of helping based on love or strong caring.* The earliest recorded philanthropist was probably, as David Western notes in his essay (next), the Good Samaritan who helped needy strangers he met while traveling. The collection plate passed during religious services is one of the oldest and most accepted forms of institutionalized charitable giving.

Today, individuals represent the largest single source of philanthropic dollars. In the U.S., individuals contribute 75% of philanthropic dollars, totaling \$229 billion in 2007.¹ By 2020, individual charitable giving in the U.S. is projected to exceed \$300 billion. Private wealth is also growing in the UK, along with charitable giving by individuals. In the UK, there are over 168,000 active registered charities.²



Titi Conservation Alliance project, Costa Rica.
Credit: Green Hotels

Philanthropy UK, which tracks trends in giving, notes that there has been a significant shift in the types of millionaires, from those who inherited wealth to those who are self-made. This shift is resulting in a new type of philanthropist who is young, socially conscious, willing to take risks, and gives larger amounts. The new philanthropists also want to give during their lifetimes, as opposed to leaving a legacy through a bequest. They also want to experience the benefits of giving, develop a closer relationship with the beneficiaries, and see the impact and results of their support. Further, they place a high value on accountability and transparency from the recipients.³ No one personifies the new approach to giving more than Bill and Melinda Gates whose charitable foundation has given away almost \$24 *billion* since 1994.⁴

While these trends cut across many national boundaries, there are differences in the cultures of giving between countries. For example, one can look at philanthropy in the U.S., the UK, and other countries in Europe.

While U.S. government development aid, expressed as a proportion of GDP, is relatively low compared to that of other countries, donations from individuals, private organizations, and businesses are very high, dwarfing those of other rich nations. In the U.S., charitable giving represents 2.2% of GDP, while in the UK is only 1.1%, and continental Europe it is even less. This fits the observations of a number of writers in this *Handbook* that U.S. travelers are the “most generous” in supporting travelers’ philanthropy projects. Europeans are accustomed to strong welfare states where their governments provide for social services, which has lessened the need for private funding. In contrast, in the U.S., philanthropy from both private individuals

¹ In 2008, charitable giving in the U.S. declined for the first time in 12 years, with individual giving dropping by 6.3%. At the same time, the worst recession in over 50 years brought with it a marked increase in demand for charitable services. “Federal Nonprofit Reform Charitable Giving IRA Rollover,” PANO Public Policy, <http://www.pano.org/publicpolicy/publicpolicy-FederalReform.php>.

²“About Charities,” *Business Scene*, April 20, 2007, http://www.business-scene.com/view_article.php?a=1089&PHPSESSID=1ce3f8d7c80159b2314fb2c8299b6502

³ Philanthropy UK, “A Guide to Giving,” 2005, <http://philanthropyuk.org>, quoted in Harold Goodwin and Claudia Eckardt, “Travel Philanthropy Report, 2008,” World Travel Market, 2008, p. 1.

⁴“Foundation Fact Sheet,” Bill & Melinda Gates Foundation, <http://www.gatesfoundation.org/about/Pages/foundation-fact-sheet.aspx>.

and institutions is crucial for addressing basic needs and supplying services not fulfilled by the government. The U.S. also has a “generous tax regime” for private philanthropists.⁵ In addition, in the U.S. the top 10% of the population controls 70% of total national wealth. Those wealthier individuals give about half of total individual donations. In comparison, the wealthiest 10% in the UK control 56% of the national wealth and account for just 20% of all individual giving.⁶

- **Origin of Travelers’ Philanthropy**

While there is a long and rich tradition of travelers and tourism companies supporting projects in host communities, it is only over the last decade that the concept has acquired a name, started to coalesce into a more organized global movement, and begun to establish procedures and best practices.

I first became aware of this phenomenon in the mid-1990s, as I was researching a book on ecotourism.⁷ I was surprised and inspired to come across ecotourism businesses in far flung corners of the globe that were supporting health, education, basic infrastructure, micro-enterprises, and conservation projects in local communities. These early initiatives, typically begun by companies whose owners and managers had strong social and ethical values, sprang up independently in response to local needs, and without coordination or fanfare. There was not even a common name for what was happening.



Donor bike ride across Tanzania.
Credit: The Foundation for Tomorrow

In an effort to facilitate communication and learning among these early innovators, I proposed to Michael Seltzer, director of the New York-based organization, Business Executives for Sustainable Travel (BEST), that he convene a meeting of some of these pioneering tour operators and lodge owners. Seltzer picked up the ball, coined the name “travelers’ philanthropy”, and convened two gatherings.

In November 2001, BEST held the first-ever summit on travelers’ philanthropy at Puntacana Resort in the Dominican Republic. The summit brought together about a dozen businesses and community foundations that were pioneering this emergent form of “on the road” giving. In September 2002, BEST invited 25 people to a second summit, including executives from Lindblad Expeditions, Turtle Island in Fiji, and CC Africa (now &Beyond), and other corporate leaders. This meeting was held at White Oak Plantation in Jacksonville, Florida, under the aegis of the Howard Gilman Foundation. In a White Paper prepared for these meetings, Seltzer described Travelers’ Philanthropy as providing “3 T’s” of support - time, talent and treasure - to host communities.

⁵ P.A.P.-Blog, “Statistics on International Development Aid,” <http://filipsagnoli.wordpress.com/stats-on-human-rights/statistics-on-poverty/statistics-on-international-development-aid/#17>.

⁶ <http://philanthropy.org/resources/usphilanthropy>, quoted in Goodwin and Eckardt, “Travel Philanthropy Report,” p. 2.

⁷ Martha Honey, *Ecotourism and Sustainable Development: Who Owns Paradise?* Washington, DC: Island Press, 1st edition 1999 and 2nd edition 2008.

When Seltzer moved on to other work in 2003, he approached the newly formed Center on Ecotourism and Sustainable Development (CESD) about taking over BEST's Travelers' Philanthropy Program. CESD (now CREST, Center for Responsible Travel) agreed, and BEST transferred its files and remaining Travelers' Philanthropy resources to us. In January 2004, CREST issued an updated version of Seltzer's original White Paper on Travelers' Philanthropy, reflecting more recent industry trends and future directions.⁸

In April 2004, CREST hosted the first major International Travelers' Philanthropy Conference at Stanford University, in California. The groundbreaking conference was attended by 80 tourism executives involved in travelers' philanthropy, representatives from philanthropic foundations, major NGOs, UN agencies, tourism associations, and academics.⁹ After the conference, CREST built a Travelers' Philanthropy website¹⁰, created an Experts Bureau¹¹, and in 2008, commissioned the first ever documentary on travelers' philanthropy, "Giving Time, Talent and Treasure" which examines projects in Costa Rica, Kenya, and Tanzania.¹²

As a result of the 2004 gathering, a number of tourism companies with longstanding



Maasai education project, Basecamp Masai Mara, Kenya.
Credit: Basecamp Foundation

relationships with CREST voiced their desire to have a nonprofit partner based in the U.S. that could receive donations securely and offer U.S. donors tax deductibility for their contributions to community projects. CREST worked with its lawyers and JustGive.org (a company that offers a secure server for donations to nonprofits) to develop a website portal to receive online donations for projects supported by our partner tourism companies. As is standard in the industry, CREST retains 10% of donated funds to cover administrative costs and help to support its programmatic work in this field. Today CREST's Travelers'

Philanthropy website (www.travelersphilanthropy.org) is a comprehensive, one-stop-shop for information about creating and promoting travelers' philanthropy programs, while its donation portal allows travelers and others to make tax deductible donations online to the community projects listed on the site.

In December 2008, CREST hosted the second International Traveler's Philanthropy conference in Arusha, Tanzania, bringing together 230 practitioners from socially responsible tourism businesses, experts in the field of sustainable tourism and philanthropy, community-based organizations and global and regional NGOs doing development work, the United Nations and other development agencies, philanthropic foundations, government, and international media. The 3-day conference -- at which Nobel Laureate Dr. Wangari Maathai, founder and leader of Kenya's Green Belt Movement, gave the opening keynote address -- was the largest and most diverse travelers' philanthropy conference ever held and the first conference in Africa to address travelers' philanthropy.

⁸ http://www.travelersphilanthropy.org/resources/documents/whitepaper_report.pdf

⁹ <http://travelersphilanthropy.org/events/archive.html>.

¹⁰ www.travelersphilanthropy.org.

¹¹ <http://www.travelersphilanthropy.org/resources/experts-bureau.shtml>.

¹² Copies are available from CREST. See <http://www.travelersphilanthropy.org/resources/film.shtml>.

The attendance figures from our two travelers' philanthropy conferences provide a quick gauge of the growth in interest in this movement. The 2004 conference had 80 participants, while the second in Tanzania had 225 participants from 20-plus countries, and was co-sponsored by 31 companies, NGOs, and UN and development agencies. Today it is fair to say that there are thousands of tourism companies involved in 'give back' projects.

As travelers' philanthropy has grown, discussions about it have become richer and deeper. The 2008 conference examined, for instance, moving from charity and handout philanthropy models to selecting projects that promote social empowerment and entrepreneurship; using travelers' philanthropy to address two critical global issues, HIV AIDS and climate change; and best practices and bad practices for engaging travelers. "The success of this conference was that it was not an academic jamboree. Instead, it was a place where actions/experiences were shared and debated," commented Gopinath Parayil, founder of The Blue Yonder, an Indian tour company.

CREST and the Monteverde Institute are organizing and hosting the 3rd International Travelers' Philanthropy Conference in July 2011, in Costa Rica. On the agenda is a new approach - destination-wide travelers' philanthropy programs supported with a common fund. Previously, travelers' philanthropy typically involved individual hotels or other tourism businesses providing support to community projects through corporate and visitor donations. While it is clear that these initiatives are collectively generating tens of millions of dollars annually, they are uncoordinated and unmeasured in terms of contributions or impacts.

In late 2010, CREST began pilot projects with the Monteverde Institute and Fundación Corcovado in Costa Rica to build destination-wide travelers' philanthropy programs in Monteverde and the Osa Peninsula. These pilot projects move travelers' philanthropy to a new strategic level: one that creates a fund through destination-wide traveler donations that will support a suite of carefully selected projects identified as meeting local development and conservation priorities.



Technical High School Farm helps rural youth, Ecuador
Credit: Yachana Lodge

- **Travelers' Philanthropy and Trends in Travel and Development Assistance**

Travelers' philanthropy is being propelled not only by the growth in individual giving but also by the growth in travel and shifts in traveler preferences, as well as by shortfalls in international government assistance to developing countries. Individuals all over the world are traveling more, making them a powerful economic force by virtue of sheer numbers. International tourism increased nearly 28-fold between 1950 and 2000, and is projected to double again, reaching 1.6 billion international tourist arrivals by 2020, according to the United Nations World Tourism Organization.¹³ Travel and tourism represented the largest single sector of the world economy, contributing, in 2009, 9.2% of global GDP and employing 8.2% of the people around the world

¹³United Nations World Tourism Organization (UNWTO), *Tourism 2020 Vision*, http://markkit.net/untrusted/unwto.org_facts_eng_vision.htm.html.

(over 235 million), according to the World Travel and Tourism Council 2010 report.¹⁴ Although in the first decade of this century, the travel industry declined following the terrorist attacks of September 11, 2001, the start of the U.S. war in Iraq, and the global economic recession, over the long term, travel and tourism is expected to resume its rapid growth. In 2010, international tourism arrivals reached 935 million, up 6.7% (22 million) from 2008 and 22 million more than the pre-crisis peak level in 2008.¹⁵

Destination preferences are also shifting. While travel to Europe and North American has declined, visits to Africa, Asia, and other destinations in the developing world have increased sharply in the last quarter century. One in every five international tourists now travels from an industrialized country to a developing one, up from one in 13 in the mid-1970s.¹⁶ Of the poorest 100 countries, over half had a growing or significant tourist industry.¹⁷ “For the world’s 49 so-called least developed countries, most of which are in Africa or Asia, tourism is one of the few ways to actually participate in the global economy,” notes Lisa Mastny in a World Watch report.¹⁸

At the same time, more consumers are expressing interest in life-enhancing, transformational travel that, at a minimum, does not harm the places visited. When done well, travel can offer people the opportunity to change: to look outside themselves, past preconceived notions and cultural conditioning. Travel also provides the rare opportunity to witness firsthand the beauty and fragility of other societies, cultures, and natural systems. Such experiences generate strong philanthropic impulses.

Indeed, a 2008 MSNBC and *Conde Nast Traveler* survey found that 80% of the 1600 respondents said they are very or somewhat interested in giving back to local communities when traveling and 62% expressed an interest in volunteer vacations.¹⁹ (See, as well, “Consumer Demand for Travelers’ Philanthropy” and “Consumer Interest in Voluntourism” in this *Handbook*.) Well established travelers’ philanthropy programs report that fully half of their guests participate and those with sophisticated donor communications programs note steady and dramatic increases in guest donations. The emerging travelers’ philanthropy movement is channeling these gifts toward economic development and preservation in many of the places where the need is greatest.

At the same time that travel is increasingly important to developing countries, the percentage of gross domestic product that the United States and other developed countries give to developing countries has fallen. For example, in Africa, aid was halved in real terms over the past decade from \$39 to \$19 per capita; for the Philippines it fell from \$25.50 to \$7.60. according to the United Nations Development Program’s *Human Development Report* for 2002.²⁰ While levels of official aid rose somewhat with the launch of the Millennium Development Goals, the UN continued to find, “There is too little aid and too much of what is provided is weakly linked to human development.”²¹ In recipient countries, most aid goes to large international groups while

¹⁴ World Travel and Tourism Council (WTTC), “WTTC Forecasts Subdued Growth for 2010,” March 11, 2010, http://www.wttc.org/eng/Tourism_News/Press_Releases/Press_Releases_2010/WTTC_Forecasts_Subdued_Growth_For_2010/.

¹⁵ UNWTO, “UNWTO World Tourism Barometer (Advance Release): International Tourism 2010: Multi-speed recovery,” January 18, 2011, <http://aboutourism.wordpress.com/2011/01/18/unwto-world-tourism-barometer-advance-release-international-tourism-2010-multi-speed-recovery/>.

¹⁶ Lisa Mastny, “Chapter 5: Redirecting International Tourism,” *State of the World 2002*, World Watch Institute, December 11, 2005, <http://www.worldwatch.org/node/3624>.

¹⁷ Overseas Development Institute, “Pro-Poor Tourism Briefing,” no. 2, London, March 2002, p. 2.

¹⁸ Lisa Mastny, “*Traveling Light: New Paths for International Tourism*,” World Watch Paper 159, December 2001, p. 19.

¹⁹ Ron Lovitt, “The Value of Voluntourism,” February 21, 2008, <http://www.msnbc.msn.com/id/23262573/>.

²⁰ BBC News, “Africa Bottom of Development League,” July 24, 2002, <http://news.bbc.co.uk/2/hi/africa/2148544.stm>.

²¹ UNDP, “Aid for the 21st Century,” 2005, http://hdr.undp.org/en/media/HDR05_chapter_3.pdf.

little flows directly to community-based efforts that are working in collaboration with other local stakeholders to solve many of the most pressing issues.

Given the scale of the tourism industry, the associated profits, jobs, and local investments accompanied by philanthropy could meaningfully reduce the staggering economic inequalities of the contemporary world. Increasingly, partnerships that include individuals, companies, civic institutions, and NGOs are needed to augment governments' efforts. Travelers' philanthropy encourages the development of such partnerships and creates a new stream of economic assistance dollars in locales that most need to build local assets and conserve natural resources.

The importance of these new revenue streams and philanthropic vehicles cannot be overstated. Grassroots groups are tackling astoundingly complex and critical challenges. Almost half of the world's population lives on less than two dollars per day. The HIV/AIDS epidemic is threatening the economic prospects of whole countries in Africa, Asia, and elsewhere. Many indigenous languages, customs, and cultures are at risk of extinction. Sixty percent of the world's coral reefs are threatened with destruction from human activity,²² and dozens of species go extinct every day.²³ In addition, civil conflict is triggering mass human migrations that destabilize fragile communities and natural environments. In the foreseeable future most of the world's population will not know nature in any direct way.

The grassroots organizations that are on the front lines rarely receive directly any of the billions of dollars in development assistance that are channeled through governments and nongovernmental organizations. As a result, new sources of funding, administered locally for locally-defined priorities, are desperately needed. This is precisely the locus of most travelers' philanthropy programs, operating as they typically do through partnerships with local businesses, individuals, and NGOs in impoverished locales. The programs have tremendous potential because they also bring together the world's most affluent people with its poorest, with mutually beneficial outcomes.



Training at HIV/AIDS clinic, Kenya.
Credit: Ogra Foundation

Globalization has the power to bring greater social justice, economic development, and environmental preservation to the world. It can also further marginalize fragile communities and cultures, as well as accelerate the immense damage being done to our planet. As an indispensable and growing element of globalization, travel can be a powerful way to harness globalization's positive potential. Travelers' philanthropy programs, like those described in this *Handbook*, are demonstrating that enduring partnerships between travelers, local leaders, and travel-related businesses can strengthen under-resourced communities and help position them to get a fairer share of globalization's fruits.

²² Dirk Bryant, Lauretta Burke, John McManus, and Mark D. Spalding, *Reefs at Risk A Map-Based Indicator of Threats to the World's Coral Reefs*, World Resources Institute, 1998, <http://www.wri.org/publication/reefs-at-risk>.

²³ Environmental Literacy Council, "Threatened & Endangered Species," <http://www.enviroliteracy.org/article.php/33.html>.

- **A Note of Caution**

While there is a clear need for the resources that travelers' philanthropy can generate, good outcomes are not guaranteed. CREST believes that travelers' philanthropy programs should emphasize the quality not the quantity of partnerships between tourism businesses, travelers, and local community projects. While the research and case studies in this *Handbook* demonstrate that people contribute more if they actually see a project and meet with local people (rather than simply reading about a project on a website), these interactions need to be carefully planned. We are *very aware* that 'doing good' does not always mean 'doing right'.

Experience has shown the downsides to philanthropy and voluntourism, if it is done poorly (failed projects, corruption, broken promises, divisions in the local community, inappropriate gifts, etc.). See, for instance, examples of "Unwanted Philanthropy" in Chapter 6. Here are a couple more examples:

- In response to a tourist's request drop in on an orphanage for a few hours, a tour operator in Cambodia replied, "Children are not pets. Orphanages are not zoos."
- A notice posted in a tourism van in East Africa and signed by the Director of the World Health Dental Organization, read: "WARNING: Please DO NOT give candy (sweets) to the Maasai children. They are unprotected without fluorides, toothbrushes, painkillers and dentists. TOURISTS WHO GIVE SWEETS ARE CAUSING MAJOR TOOTH DECAY AND SUFFERING!"
- A school in South Africa received a dozen computers from a well meaning American, sent via a safari company as part of their travelers' philanthropy program. Several years later, the computers still laid piled in the corner of a classroom because the school had no electricity.

As David Abernethy's essay in Chapter 6 details, good intentions can have unintended negative consequences, especially when the interaction is between people from vastly different economic and cultural backgrounds. CREST's publication, "Dos and Don'ts of Travel Giving" (see Appendix 1) is intended to help travelers think critically about the potential impacts of their urges to help. Similarly, the "Voluntourism Operator Check List" is designed to help tour operators to effectively integrate volunteer projects into their trips (Appendix 2). Traveler education is essential for channeling well-meaning offers to help into responsible donations for sustainable community projects.

- **How Much is Travelers' Philanthropy Contributing?**

Nobody knows. That is the conclusion of CREST's research, including of the surveys, essays, and case studies commissioned for this *Handbook*. It is also the conclusion of the 2009 "Travel Philanthropy Report" commissioned by the World Travel Market (WTM). As this report states:

Most companies keep no records and very few have systems in place to be able to easily report how much is raised by companies, staff and travelers.... There is

surprisingly little information available about the scale of travel philanthropy either in the originating markets or in the destinations. However, it is clear from the case studies in this report that very significant sums of money are being donated in, and to the benefit of, destinations by travelers and companies; and that very significant sums are also being generated for charities in the originating markets.²⁴

The surveys cited in both the WTM study and this *Handbook* suggest that while travelers' philanthropy is still a small percentage of total individual charitable donations, the overall contributions are significant:

- The 2009 WTM study identified almost. £160 million (\$248 million) in cash donations raised by 39 companies and organizations over a wide range of time periods.²⁵
- The 2008 WTM report tabulated total donations by 36 travel companies of over £4.2 million (\$6.7 million) in 2007, with an almost even 50/50 split between donations by the company and their customers, and only 4% contributed by staff.²⁶
- 27 tour companies surveyed in Arusha, Tanzania reported collectively donating \$688,991 during 2008. The amounts per company varied from \$1,000 and \$163,000.²⁷
- Lindblad Expeditions raised \$4.5 million in visitor donations over a decade for the Galapagos Conservation Fund.²⁸
- Myths and Mountains' READ Global fund raised over \$10 million in 20 years for library projects in Nepal.²⁹
- The CMI Green 2009 survey of over 1000 travelers found 83.7% gave between \$11 and \$500 while traveling.³⁰
- A sampling of donors interviewed for the *Handbook* found they contributed on average \$1000 to \$2000 annually to projects they learned about while traveling.³¹

The potential is enormous for greatly increased levels of giving through more effective travelers' philanthropy initiatives. When done properly, travelers' philanthropy meets the objectives of the new philanthropists described earlier in this essay, namely hands-on experiences, contact with the recipients, accountability and transparency. Yet, as written in the WTM study, "Travel philanthropy is an opportunity missed when we do not use our presence and reach to benefit local charities in the places we care about. They need and often deserve our support; they do not have any other opportunity to raise money from people in the originating markets."³²

Since 2003, CREST has worked to carefully develop its own unique model of travelers' philanthropy that is designed to deepen and broaden the concept of philanthropy for tourism companies, travelers, and local organizations. The CREST model has five broad objectives:

²⁴ Harold Goodwin, Lucy McCombes, Claudia Eckardt, "Advances in Travel Philanthropy: Raising money through the travel and tourism industry for charitable purposes," World Travel Market, 2009, p. 15.

²⁵ Goodwin et al, "Advances in Travel Philanthropy," World Travel Market, 2009, pp. 15, 73.

²⁶ Goodwin and Eckardt, "Travel Philanthropy Report," 2008, p. 8.

²⁷ Joanna Wolff, "Survey of Tour Operations in Arusha, Tanzania," Chapter 4.

²⁸ Sam Ham, "The Ask—Or is it the Offer?" Chapter 4.

²⁹ Antonia Neubauer, "Myths and Mountains and READ Global," Chapter 2.

³⁰ CMI Green, *The CMI Traveler Survey 2009*, vol. 1, 2009. p. 106.

³¹ Jill Talladay, "Why Travelers become Philanthropists: Donor Motivations," Chapter 6.

³² Goodwin et al, World Travel Market, 2009, p. 4.

- 1) To provide tourism businesses with tools and training to undertake effective community and conservation 'give back' initiatives;
- 2) To help local NGOs and community-based projects become tourism ready and to determine how and when to engage with tourism businesses and travelers;
- 3) To increase awareness of travelers' philanthropy with the media, public, travel industry, governments, foundations, and development agencies;
- 4) To convert travelers' spur-of-the-moment giving into ongoing, substantial support for development projects; and
- 5) To develop and disseminate best practices and rules of engagement for travel companies, travelers, and communities involved in philanthropy and volunteer projects.

CREST has developed a 'toolkit' of resources – a comprehensive website and donations portal, publications, Experts Bureau, documentary, and international conferences -- to help ensure travelers' philanthropy is done well. This *Handbook* designed for travel companies, community organizations, and travelers, is the latest contribution to the CREST Toolkit.

Travelers' Philanthropy and the Good Samaritan³³

By David (Jonah) Western, Ph.D.
Founder and Chair, African Conservation Centre³⁴

We all begin life as travelers. The question is, when we finish the trip of life do we leave the people and places we visited better off? This question is at the root of my interest in travelers' philanthropy. But what is travelers' philanthropy? How can a traveler's goodwill help the people and places visited?

The overarching goal of traveler's philanthropy is to improve lives and communities by supporting social services, health, education, conservation, social justice and empowerment, climate change, tourism, business and enterprises. I would suggest that increasing equity and knowledge are also goals of travelers' philanthropy, if they are not implied by empowerment.

- **Tourism, Ecotourism, and Travelers' Philanthropy**

To get a feel for the emergence of travelers' philanthropy, I look at the origins of tourism itself, then to the development of ecotourism, and finally to how philanthropy can add value to ecotourism and, perhaps, even to the tourism industry as a whole.

Tourism is the single biggest transfer of wealth from North to South. It can be part of the response to Africa's call for "trade not aid" from the developed world. Ecotourism is a small but significant part of the wealth transfer through tourism. But, dollar for dollar, ecotourism does far more for people and nature than regular mass tourism. Yet both come down to fees paid for services rendered. The fee is the cost of participating in the tourism activity and the way the traveler pays for the amenity value received. The regular tourist may (or may not) hope those fees do some good in the places he visits. The ecotourist insists they do.



Community Wildlife Scouts, Kenya. Credit: David Western

In the final analysis, though, tourism is still based on fees--and ecotourism on fees plus good practices. Lacking in both is the satisfaction that comes of making a personal contribution--and seeing people and nature benefit as a result. The personal contribution distinguishes travelers' philanthropy from ecotourism. But does that make travelers' philanthropy trade-plus-aid? Or does travelers' philanthropy also involve a personal conscience to ensure that charitable giving does good, not harm? The distinction is important if travelers' philanthropy is to build on the positive force of ecotourism and avoid the negatives associated with regular, mass market tourism. The challenge for travelers' philanthropy is to marshal the raw potential of charity as a positive stimulus to community development and conservation.

³³ This paper is based upon the keynote address that Dr. Western gave at the 2008 Travelers' Philanthropy Conference.

³⁴ www.africanconservationfund.org.

- **Origins of Travelers' Philanthropy**

The earliest philanthropic traveler is the Good Samaritan in the Bible. The Good Samaritan was the traveler who helped the poor and suffering he met along the way, strangers he might never see again. How do we translate ancient Good Samaritanism into modern travelers' philanthropy for the good of people and nature along the road?

Despite the numbers and money in global tourism, it has its dark side: the demand for cheap flights and cheap vacations has seen the travel industry cut costs to the bone. Larger visitor numbers must make up the thinner profit margins. The difference in wealth and cost of living is provided momentum for visitor flows from rich to poor countries because it is inexpensive to vacation in those locations. The combination of mass tourism and economic differential leads to paltry incomes, high social costs, and often adverse environmental impact for developing countries.

On the bright side, the poor countries will have a market advantage for the conceivable future, particularly if they can offer greater benefits and lower costs. This is where the ecotourism principles come in, and where the philanthropic traveler can add far more than fees, standards, and fair trade practices can exact.

How can the benefits of ecotourism be amplified by travelers' philanthropy? How can ecotourism plus travelers' philanthropy help to redress the dark side of global travel?

- **Changing Sensibilities of Visitors**

Tourist concerns about rights, justice and fairness, and about bettering the lot of local people and wildlife, have grown in the last decade. These concerns stem from the ecotourism movement and media coverage. The ecotourism principles, standards, and policies and the new sensibilities of today's responsible traveler are reshaping global tourism. As a result, the benefits of tourism are rising and downside falling for third world destinations.

In the slipstream of travelers flow benefits that are far less visible than revenues. Donor countries tend to give aid and support to nations visited by their citizens. Visitors and donors alike see poverty, lack of social services, and injustice. Their concern and support makes a difference to the pace of development. These are not benefits commonly attributed to tourism, but they should be. One man, Edmund Hillary, devoted his life to building schools and health clinics in Nepal after his ascent of Everest. Tens of thousands of other benevolent if less adventurous travelers have donated time and money to development. There is yet another less obvious slipstream effect: where tourists go, businesses and non-government organizations follow.

I want to stress the word "responsible". The ecotourist is, above all, the responsible tourist who aims to do good for people, places, and nature. Our intention was to use the sensibilities of visitors to create a movement for better tourism, rather than have a donor or conservation



Maasai guide and tourist, Kenya.
Credit: David Western

organization try to drive the change. The power of ecotourism lies in the good intentions of millions of travelers and in satisfaction they get from being a positive force. The traveler's urge to do good gives ecotourism the power to grow spontaneously through contagious social responsibility, rather than by rules and regulations and policies. They too have their place, but are better at fine tuning than shaping consumer behavior.

A few decades into this great experiment, has ecotourism succeeded? The answer is directly relevant to travelers' philanthropy. If ecotourism hasn't succeeded, why should travelers' philanthropy do any better? If it has, what can travelers' philanthropy add to ecotourism?³⁵ On balance, ecotourism has become a reality with recognized principles and practices. It has also overcome the perception of being a green marketing tool of the tourism industry. And ecotourism principles and practices have now become a positive force for development and are helping to move the tourism industry towards sustainability.

- **From Ecotourism to Travelers' Philanthropy in Kenya**

In the following example, I show how ecotourism has begun to open the door to travelers' philanthropy by creating the enabling environment, institutions, and governance needed for successful community-based conservation.

East Africa has the richest biota on earth, one that has coexisted with pastoral peoples for millennia and humankind since our emergence in the savannas. Here we face the awesome task of conserving wildlife in the face of rapid population growth, poverty, and development. How can responsible tourism prompt communities to conserve wildlife for their own advantage, rather than depend on outside conservationists and donors?

In the early 1990's, Kenya had no legally constituted wildlife associations through which local communities could have a voice in wildlife management policies. Good-willed visitors and a few tour operators spent years struggling against local suspicion, tussles and jealousies, trying to develop tourism on community lands. Local leaders filched money and gave jobs to relatives. Tourist revenues became a source of conflict and corruption. Then the Kenya Wildlife Service (KWS), under its Community Wildlife Service, helped form wildlife associations. Legalizing these associations gave communities a voice and way forward through a representative body, the National Wildlife Forum (NWF). The associations and NWF, with KWS backing, overcame formidable government opposition to the wildlife associations and promoted community participation in the tourism industry. Associations enabled communities to raise conservation and development funds, set up conservancies, and train members in the business and conservation skills. These activities spurred collaboration,



Community Resource Assessors, Kenya.
Credit: David Western

³⁵ For an overview and review of ecotourism see Martha Honey, *Ecotourism and Sustainable Development: Who Owns Paradise?*, 2nd edition (Washington, DC: Island Press, 2008).

openness, and accountability among communities and their development partners. Good governance is the glue that binds them.

Tourism was the trigger for wildlife associations, and ecotourism the stimulus to better practices. Once the communities showed tangible results, a growing number of visitors contributed money and supplies for education, health, water projects, and other development activities. These were early examples of travelers' philanthropy which flowed from successful growth of ecotourism and wildlife associations.

The positive effects of institutional development and better governance among wildlife associations are, like so much else in ecotourism, often invisible and always hard to measure. It begins with a change in attitude, then behavior, and by incremental steps, leads to better development and conservation.

In one respect the outcome is plain and measurable. Wildlife censuses tell the story. Kenya has lost nearly 50% of its wildlife since 1977. The numbers are falling in our parks as fast as outside, reflecting their connection to surrounding areas through seasonal migrations. Today our national parks only account for 10% of all our wildlife in Kenya. However our tourism industry depends on the parks. If we rely on tourism as-usual instead of ecotourism Kenya may not have much left to offer. That's a pretty scary thought.

But now let me tell you the good news: 40% of all our remaining wildlife is in community-based wildlife areas and on private lands. This has been a major turnaround since the mid-1990's when we launched Parks Beyond Parks. Why? The answer lies in community efforts to protect wildlife and promote ecotourism. Namibia and other southern African countries that encourage local conservancies have had the same positive result.

Looking across the rift valley to the Masai Mara, you confront the worst of Kenya's minibus tourism and harried predators. The free-for-all has many losers and few winners. Yet, oddly, it is in Mara that ecotourism is pointing to a way out of the minibus nightmare and paving the way for travelers' philanthropy. On the recently subdivided communal lands around Mara, Maasai owners are brokering agreements with a coalition of hotelier and tour operators to establish conservancies, pay wildlife leases to Maasai share-holders, set up a transparent fee-collection system, and commission a professional agency to plan and manage the conservancy. The driving force is ecotourism. The strong institutional framework and transparent governance that ecotourism stimulates opens the door for travelers' philanthropy to contribute to community development and conservation projects in new and complementary ways.

Yet today both external and internal forces continue to undermine responsible tourism. The progressive ecotourism operators are struggling to raise the leasing fees from tourist revenues in the face of global economic recession and to counter corrupt leaders and predatory operators who broker deals that undermine the community conservancies. For the moment, the worst of tourism is outstripping the best of ecotourism. Travelers' philanthropy could tip the balance by playing the Good Samaritan.

- **Travelers' Philanthropy and Community Conservancies**

I have purposely snuck in travelers' philanthropy at the end of a review of ecotourism to show how it grows out of, builds on, and adds to ecotourism. There has been philanthropic giving all along, but in small amounts, often boosting the power of corrupt leaders and creating a "hand-out mentality" where residents expect gifts. Now that the proper institutions and governance are

in place, truly beneficial, successful traveler's philanthropy can grow and mature. The time is ripe to marshal the power of travelers' philanthropy in Kenya and around the world.

A key role for travelers' philanthropy lies not in our national parks, but on lands beyond parks, working with the communities that created their own conservancies and lodges, together with their ecotourism business collaborators.

The African Conservation Centre (ACC)³⁶ started by launching ecotourism businesses in Shompole and Olkiramatian in the rift valley between Amboseli and Mara. The lodges in two adjoining conservancies, half again the size of Nairobi National Park with four times the wildlife and many more predators to boot, are attracting ecotourists with a taste for naturalistic safaris. The conservancies double as grass banks for livestock during droughts and have lowered mortality rates relative to neighboring ranches. Not surprisingly, the Shompole and Olkiramatian communities see the conservancies as good for livestock as well as wildlife, and therefore good for its members too.



Annual wildlife migration, Kenya.
Credit: David Western

The impact of ecotourism and philanthropic contributions on community conservancies is already evident in Shompole and Olkiramatian. Wildebeest and zebra numbers have climbed since the sanctuary was established in 2000. Lions numbers have risen from 10 to 35, cheetahs are seen far more frequently. Wild dogs have re-established populations in the area. Elephants have spread out from Amboseli and Mara and into these conservancies. Striped hyenas and other nocturnal carnivores seldom seen in parks are prime attractions for Shompole and Olkiramatian tourists out on night drives.

By reinforcing and adding to ecotourism, travelers' philanthropy can help conserve our parks and connect the vast open landscape that elephants, lions, and other large herbivores and carnivores need to survive. There are dozens of other wildlife hotspots under threat around East Africa. All could benefit from similar community development programs that stem from conserving open healthy landscapes.

- **Travelers' Philanthropy and Climate Change**

I end by considering whether travelers' philanthropy can tackle a far larger goal it has set itself, climate change. In recent years, in keeping with global conservation goals, most African nations have widened their horizons from "game" animals to biodiversity--all forms of life, big and small. The challenges of conserving biodiversity are far greater than conserving our large charismatic animals. Let me explain why.

Look at the distribution of all mammal species across Africa. Immediately evident is the great concentration of species in the Kenya-Tanzania borderlands. The Kenya-Tanzania borderland's

³⁶ African Conservation Centre, <http://www.conservationafrica.org/>.

buckled landscape and high mountains capture and hold a large portion of all the species that ebbed and flowed across the continent over the millennia.

To withstand future climatic changes, the rich panoply of plants and animals in the borderlands must be able to move up and down the altitudinal gradients and across large open landscapes. I have been studying how land fragmentation and climate change could impact wildlife, biodiversity, and rural communities. The outlook is deeply worrying.

Two human-induced changes are underway that in tandem threaten the biodiversity of the Kenya-Tanzania borderlands. First, land subdivision and settlement is breaking up the open landscape and the continuity of habitats strung along altitudinal gradients. Second, global warming due to carbon dioxide emissions is accelerating climate change. These two forces threaten the borderland's natural buffering system and put at risk species that evolved over millions of years and accumulated over climatic oscillations.

Increasing human populations, spreading settlement, and climate change threaten our premier wildlife areas. The rich wildlife populations in Mara and Amboseli stand out like skyscrapers against the low densities elsewhere. A sea of human settlement surrounds the 14 borderland parks. How can these great wildlife herds withstand encirclement and climate change?

The only solution is to create large land associations to buffer wildlife from climate change. With their wealth of wildlife, there is still hope of keeping the borderlands open to the benefit of its communities. But it will take collaboration between landowner associations, conservationists, ecotourists and the philanthropist to pull it off. This is not to say governments have no role to play. They do. Kenya and Tanzania - working together - have a large role to play. My principal message here is to identify and open the door to a new and important player, the philanthropic traveler.

I hope that the examples I have given will open up discussions on the role of travelers' philanthropy in conservation and community development. I am cautiously optimistic that it can play a new and vital role, if done thoughtfully. The extra money and support philanthropy brings could spell the difference between community-based conservation success and failure. But like so much donor money, it could create dependency rather than self-reliance, if done badly. The challenge for travelers' philanthropy is to be a Good Samaritan.

What is Successful Philanthropy?

By Mark J. Spalding
President, The Ocean Foundation³⁷

Travelers' philanthropy is the next development in responsible tourism. However, the term has been something of a misnomer: In practice, it has often been more about impulse charity by travelers and/or contributions by travel operators or hotels to meet what they perceive as local needs and priorities. While such gifts are filled with good intentions, they can have, as discussed below, unintended consequences.

So, when we say "travelers' philanthropy", what are we talking about? Giving back to the host community? Enhancing a traveler's experience? "Voluntourism"? Or, are we actually talking about effective philanthropy? Simply collecting donations from travelers does not constitute organized, strategic philanthropy. This essay discusses some of the very real opportunities for the travel industry to create successful philanthropy programs.

Philanthropy is the giving of time, money, and know-how to advance the common good. Effective, strategic, targeted, and professional philanthropy involves more than just throwing money at exciting projects and hoping for the best.

- **Time, Talent or Treasure**

"Perhaps travel cannot prevent bigotry, but by demonstrating that all peoples cry, laugh, eat, worry, and die, it can introduce the idea that if we try and understand each other, we may even become friends." – **Maya Angelou**

Many millions of people are traveling for pleasure each year. Their money gets spread across an array of businesses at every step of the trip, including airlines, hotels, local transportation providers, attractions, and so on. However, since 80% of tourism businesses are small-scale and the profit margin in the tourism industry is generally narrow, many businesses, even when they are financially viable, feel they are not able to "give back" beyond the jobs created in a community.



Loreto Bay National Marine Park. Credit: Kama Dean

We know that poverty is a cause of environmental degradation. Tourism can reduce poverty (and by extension reduce degradation) by building sensitively, creating jobs, and building an understanding of the value of local resources. Hotels and resorts sell **natural amenities**: parks, beaches, coral reefs, dive sites, surf breaks, recreational boating, bird watching, sport-fishing, scenic vistas, culture and lifestyles. Other than land prices for an "excellent location," the tourism venture owner/operator does not have to pay for these natural amenities. There is no capitalization, and usually little or no maintenance costs. However, these natural amenities are more important to the success of a

³⁷ www.oceanfdn.org.

tourism business than any built assets. The beach and ocean make you more money than, for instance, a golf course, and you don't have to buy the land, design the course, build it, or operate it.

Communities in and around desirable landscapes can enhance those natural and built amenities, or sink them. The healthier the community and the more its residents feel that they are partners in the economic success of tourism, the more likely that a tourism project will be sustainable over the long-term. Sustainable development is broader than a 'green' hotel or other types of tourism operations. **Sustainability is not simply a differentiation point. It is now a necessity** for all types of tourism -- coastal, marine, cultural, adventure, urban, and ecotourism.



Over the last two decades, ecotourism has pioneered the principles and good practices of low-impact, high value travel. Ecotour operators intentionally incorporate resource protection into building design and operation. They promote equitable labor practices and deliberately provide opportunities for travelers to sensitively interact with residents in nearby communities.

Like other 'best practices' within the tourism industry, travelers' philanthropy also began as ecotourism businesses and their guests responded, out of compassion or guilt, to needs they saw in the host communities. But these early travelers' philanthropy projects were often driven by what guests or business owners believed the community needed instead of asking the community about its priorities. These first projects typically lacked formal organization or a framework to provide consistency, long term strategy, and impact analysis.

This type of top-down charity, where the donor decides what to support based on his own perceptions, can create a range of unintended negative consequences, including:

- **Lack of Sustainability:** contributions are not predictable and sustained over time.
- **Dependency:** donations such as used clothing lead to dependency on outside support rather than helping to build capacity and strengthen local empowerment and self-sufficiency.
- **Incomplete Action:** in most cases, one-time contributions by visitors cannot help to bring about fundamental changes unless they become part of pool of funds dedicated to meaningful development projects.
- **Mistaken Priorities:** donations driven by a tug on visitors' heart strings – a begging mother or a cute child -- may not provide the support most needed by the community.

- **Ten Steps to Successful Travelers' Philanthropy**

"The use of traveling is to regulate imagination by reality, and instead of thinking how things may be, to see them as they are." – **Samuel Johnson**

Travelers' philanthropy involves a partnership between community and its local projects and a tourism business and its travelers. Each of these partners 'gives and gets' from successful philanthropy. In creating a travelers' philanthropy program, tourism businesses need to:

1. Learn About and With the Community

To create effective travelers' philanthropy programs, tourism businesses need to begin by learning about – and from – the community that the philanthropy is intended to benefit. What are its beliefs, values and practices? Its local aesthetic? The vernacular for architecture? What do people see as their main needs, and what are their hopes for the future? Who are the leaders, the local change agents, and local institutions and organizations? What benefits does the community hope will come through tourism and the financial support of the visitors? These are some of the questions that should be answered as a first step towards creating a travelers' philanthropy program.

2. Close and Continual Observation and Engagement

A tourism business owner or philanthropy manager should walk the community often, interview people informally, look at local practices, and in other ways do the necessary homework and follow up.

3. Respond to The Symptoms *and* The Causes

In selecting which projects to support, focus both close to the tourism site as well as on systemic problems that may be regional or national.

As we learned on a trip to the Tanzanian village of Ololosokwan near a safari camp, the local doctor may tell you he needs lots of antibiotics. However, this may hide real underlying and more complex needs for public education about socially transmitted diseases (STDs) and social hygiene or for clean drinking water and reliable energy sources for cooking.



4. Diversify Strategies

There are no silver bullets for making positive change so look for a variety of opportunities for incremental improvements. Educating children, for example, involves adequate nutrition as well as books or other supplies, classrooms, and good teachers. Unless travelers' philanthropy funds are very limited, it is wise to address more than one need of the community and not put all your eggs in one basket.

5. Do Your Due Diligence

Just as you've carefully designed your business, it's important to design your philanthropy program. You have done your homework to prioritize what needs to be done, diversified your strategies, asked for and received money from the visitors. Now, you need to do some due diligence on the many possible recipients of funds that help to address your charitable interest.

The Ocean Foundation helps its donors by using a 22-point due diligence check. If you don't, you may not be giving to the organizations and projects that are most effectively addressing a problem. For example, the most prominent international NGO may not be the best vehicle for converting your gift of time, treasure, or talent to something meaningful in the target community.

Table 1: Due Diligence

The Ocean Foundation (TOF) staff does a review of publicly available information on potential grantees and rates them across 22 variables. While some of these are specific to well-established U.S. organizations, this is the range of information it is useful to ask from organizations receiving travelers' philanthropy funds:

1. Type of work
2. The grantee's mission and program
3. Relevance to TOF priorities and our mission
4. Availability of TOF resources that match a request
5. Effectiveness at addressing threats
6. Cooperation and joint work with others involved in the place or in conservation results/outcomes predicted and evaluation plans (10 year horizon)
7. How the outcomes and results of the proposed project will be disseminated to audiences beyond those participating directly in the project. These may include publications, conferences, community events, media presentations, etc.
8. Political stability in target country, and the existence of a policy and regulatory framework within which the NGO does its work (the rule of law test)
9. Capacity building opportunity
10. Opportunities for co-financing/leveraging funds
11. Comparative advantage of the donor (can TOF fund this more efficiently than another entity?)
12. Full consideration of possible unintended consequences (too much money introduced into a community, lack of equity, harm to subsistence, etc.)
13. Sustainability of the project
14. Management and staff
15. Governance/Independence
16. Non-Profit Filings 501(c)(3)/990 and other legal registrations
17. How does the charity use and budget its funds
18. Fund raising practices
19. Financial statements
20. Annual reports
21. Donor privacy
22. Reporting from other organizations

6. Enhance Giving Through Visitor Experiences

It is easier to entice visitors to give generously if they have a "hands on" experience or, at minimum, experience a "seeing is believing" moment that reveals the local need. This is why so many NGOs organize special site visits for donors. However, it is important that these "hands on" experiences are appropriate and directed by the community, not the tourism business or the traveler.

7. Organize "The Ask" – and Make It An "Offer"

Be prepared to respond to your guests' desire to "give back." Based on your efforts in steps 1-5 above, have a ready list of needs and ideas for how visitors can contribute time, talent, or treasure. In addition to providing a chance for interaction with the project, it's a good idea to provide a flyer before and during the trip to let the visitor know that your company offers an opportunity to participate in a travelers' philanthropy program.

8. Institutionalize Regular Evaluations

Ensure that all grants include a clear list of deliverables to enable both self-evaluation by the grantee and your own assessment of the outcomes. Securing agreement on the deliverables requires work with grantees to specify the measurable outcomes needed to achieve their goals. Quantitatively verifiable activities will require performance indicators or specific deliverables. Qualitative activities will require a description of the desired condition sought. In both cases, identify the means that will be used to verify that the activities have been completed or have achieved the desired result. Require, in turn, that all monitoring and evaluation outcomes are then communicated to donors and others via website, newsletters, yearly reports, regular updates, and routine direct communications.

9. Honor the Work of Those on the Ground

As grantmakers, those involved in travelers' philanthropy projects have a responsibility to maintain constructive relations with grant-seekers based on mutual respect and shared goals. This involves:

- Communicating clearly and on a timely basis with potential grantees.
- Treating grant seekers and grantees fairly and with respect.
- Respecting the expertise of grant seekers in their fields of knowledge.
- Seeking to understand and respect the organizational capacity and needs of grant seeking organizations.
- Respecting the integrity of the mission of grant seeking organizations.

10. Celebrate the Outcomes and Communicate Them Clearly

Communicate to your visitors the results of your travelers' philanthropy projects, through photos, descriptions of the programs, and transparently detailing distribution and reporting mechanisms to ensure donations are properly and effectively used. Ideally, each year, an independent certified public accountant should review the fund grant records. The travelers' philanthropy progress reports and financial statements could be compiled into an illustrated annual report and posted on the web site. Thus, the visitor can see what was done with his or her help and what, collectively with the help of others, their investment accomplished.

• Conclusions

There is no question that leaving something good behind when traveling is fulfilling and meaningful. However, traveler's philanthropy will be more satisfying and sustainable if a reliable partner is accountable for who gets the donation, how it gets distributed, and how it benefits the community and the resources that may depend on travelers' support.

Success requires an advisory board without local conflict of interest. The best projects operate transparently so as to limit expectations and avoid creating perceptions of inequity. Ecotour operators often have most of these elements available because of the nature of their business and motivation. By rethinking and redesigning the mechanisms for giving to make them more formal and effective, more satisfying philanthropy can be established.

But what about mainstream tourism? What is the role for big outbound and inbound tour operators, hotel chains and resorts, and airlines and other transportation companies? What is the best mechanism for formal philanthropy programs involving the big players in the tourism industry?

There are a growing number of examples of large tourism companies that, as part of their corporate social responsibility efforts, are supporting projects in the host communities. But the support has to be real for both mainstream and ecotourism operators, and accompanied by internal operational reform where appropriate. It cannot be “green wash” -- claiming without doing. However it may make sense for newcomers to travelers’ philanthropy to engage in some “green hush” -- doing without proclaiming in order to allow time for implementation, completion of pilot projects, and development of processes, or, perhaps, to avoid being criticized for mistakes.

It is important that travelers’ philanthropy retain its community orientation, its ability to enhance the experience of visitors, and its quality of responsiveness to community needs. Travelers’ philanthropy can:

help travelers understand more than just what they see, establish revenue streams that assist projects over the long term, and build expertise in ways to use that revenue to support the three legs of sustainability: economic, environmental, and social well-being.



Kids at Christmas, San Javier, Mexico. Credit: Siri Thomas

Chapter 2:

Approaches to Travelers' Philanthropy

Overview of Various Models

By Martha Honey, Ph.D.
Co-Director, CREST

This chapter features fifteen case studies by leading companies and organizations involved in travelers' philanthropy. Their stories illustrate the wide range of ways in which tourism and tourists are contributing to the communities they visit – beyond the revenues generated by the tourism business. These examples can provide inspiration to readers who are interested in initiating a travelers' philanthropy program and insights on how to avoid common pitfalls. Thanks to the advice given by the voices of experience in these case studies, new programs can launch with more confidence and existing programs can compare their policies and practices with those of others.

Our focus in this chapter is mainly on donations of “treasure” – financial and material contributions provided by tourism companies and travelers to local projects. Some of the companies profiled are also involved in voluntourism, a rapidly growing component of travelers' philanthropy, through which travelers donate “time” and “talent”, i.e., either unskilled labor or professional expertise to assist local projects. (Voluntourism is addressed in detail in “Voluntourism: An Overview”).

- **The Pioneers**

The four oldest travelers' philanthropy programs covered in these case studies date from the late 1980s to the mid-1990s. They are:

1. **Intrepid Travel** began its travelers' philanthropy programs when the company was founded in 1989 with a commitment to donate 10% of corporate earnings to projects in the visited communities. In 2002, Intrepid formalized its dedication to philanthropy by setting up the Intrepid Foundation to facilitate visitor donations, provide better accountability and transparency, separate the tourism business from its philanthropic activities, and establish an application process for beneficiary organizations. Intrepid is currently raising over \$400,000 per year for some 50 different projects.
2. **Myths and Mountains**, a tour operator specializing in cultural and natural history tours, started the READ (Rural Education and Development) Global program in Nepal in 1991. READ Global has built more than 50 library/community centers in Nepal and has raised about \$10 million over the last twenty years. Now a separate but closely linked

organization to Myths and Mountains, READ Global runs its own donor trips which include a \$300 per traveler contribution to support travelers' philanthropy projects.

3. **Holbrook Travel** and its 40-room Selva Verde Lodge in Costa Rica built the Sarapiquí Conservation Learning Center (SCLC) in 1993 to provide a range of educational activities to the surrounding communities. In 2002, SCLC began offering community-run cultural and educational activities (classes in handicrafts, Latin dance, cooking, etc), home stays, service projects, and environmental field trips to U.S. visitors, especially high school students and teachers. The revenue from these classes is divided between the community instructors and SCLC and now covers about 75% of the Center's operating costs.
4. **International Galapagos Tour Operators Association (IGTOA)** was founded in 1995 by tour operators and NGOs involved in the Galapagos. It is a membership organization dedicated to the preservation of the Galapagos through; improving professional standards within the tourism industry, advocacy campaigns on behalf of resource conservation and responsible tourism, and raising funds to support a range of conservation projects. Collectively, through a combination of membership dues and visitor donations, IGTOA is raising about \$90,000 a year to support conservation projects in the Galapagos.

- **Range of Businesses and Types of Initiatives**

The rich tapestry of travelers' philanthropy initiatives exemplified through these case studies covers all types of tourism businesses, from individual lodgings in a single location to international companies supporting travelers' philanthropy programs around the globe to destination-wide travel funds. Both small and large operators can make a substantial contribution. Working at a single local level are companies like Hotel Punta Islita, a coastal resort in Costa Rica which hosts about 8000 guests a year, has worked with residents in several small rural communities to develop art and handicraft projects, a pre-school, an outdoor museum, and environmental education, along with a range of micro-enterprises. These benefits, plus the fact that 85% of the hotel's staff comes from these communities, mean that half of every tourist dollar spent at the resort stays in this rather remote and rural area. By comparison, sometimes less than 10% stays in local areas.



Elephant 'Moshi' with new prosthesis, Friends of the Asian Elephant hospital, Thailand.
Credit: Friends of the Asian Elephant

Increasingly, large global hotel chains, tour operators, and airlines are developing travelers' philanthropy programs as part of their corporate social responsibility. One leader in this movement among large operators is the Australian company, Intrepid Travel which takes 80,000 travelers a year to over 100 countries. Through travelers' philanthropy, Intrepid provides financial and material support to projects in 20 countries in Asia, Africa, Latin America, and Eastern Europe.

Other international companies have concentrated their travelers' philanthropy programs first in a few locations and then expanded gradually based on the lessons they learned in their pilot locations. For example, Myths and Mountains runs tours in 17 countries in Asia, Southeast Asia, and South America, but its highly successful READ Global program has been, until recently, based solely in Nepal. Today, with a major grant from the Gates Foundations, READ Global's library/community center model is expanding into India and Bhutan.

Similarly, Country Walkers -- which specializes in small-group adventure and hiking tours in over 60 destinations worldwide -- launched its first travelers' philanthropy project in 2003 in the small Andean village of Patacancha, Peru. The project has centered on a campaign to raise funds from travelers to build a dormitory so that more local students would be able to attend school as it is located too far from their homes for the young people to make the daily trip. Today Country Walkers has travelers' philanthropy programs in Peru, Nepal, and Egypt where it is raising funds for projects selected by the host communities.

While most travelers' philanthropy programs involve initiatives by individual companies, two of the case studies here describe efforts to create destination-wide travelers' philanthropy programs. The International Galapagos Tour Operators Association (IGTOA) represents some 50 tour operators, conservation groups, and others involved in tourism in the Galapagos Islands. This collaborative travelers' philanthropy initiative includes most of the tour operators working in the Galapagos. (One major operator, Lindblad Expeditions, runs its own highly successful travelers' philanthropy program in the Galapagos. This is described in "The Ask - Or is it the Offer".) In Costa Rica, a new pilot project begun in 2010 is working to create a destination level travelers' philanthropy program in Monteverde, a destination famous for its cloud forest and small scale ecotourism. This initiative, spearheaded by the Monteverde Institute and assisted by CREST, is working with tourism businesses to create a communal fund through which visitors can contribute to projects that a community committee has designated as priorities.

The case studies demonstrate that companies involved in travelers' philanthropy span all price points and types of travel, from budget to mid-range to high-end luxury. They offer a variety of types of travel from educational, cultural and historic to nature and wildlife viewing, adventure and hiking, and urban experiences. What connects them all is their shared dedication to improving both the places that their clients visit and the lives of the people who make their homes in the host communities.



Cheetah and tourists in Masai Mara, Kenya.
Credit: William H. Durham

For example, RockResorts and Vail Resorts operate a range of budget to luxury facilities in Colorado and other western states. These include ski resorts, golf courses, hotels, and condominium properties. Rock and Vail resorts have developed a guest giving program and a guest volunteer vacation program, administered by and benefiting the National Forest Foundation (NFF) and its local programs. To date they have raised over \$1.6 million to support a range of local conservation projects.

In The Gambia, a British university and its students raise funds each year to cover the cost of involving Gambian students in field-study courses on sustainable tourism attended by the

university's students. This innovation uses the concept of travelers' philanthropy to expand and enrich the traditional educational travel experience for both the UK students and their Gambian counterparts.

While many travelers' philanthropy programs seek to address community needs in rural areas, a growing number are based in cities. Calabash Tours in Port Elizabeth, South Africa specializes in township tours designed to provide visitors with insights into development and social issues affecting urban Africans, while generating jobs and augmenting incomes for poor households. Begun in 1997, it gradually expanded into travelers' philanthropy because guests wanted to support the projects they visited. In 2000, Calabash Tours set up the Calabash Trust as a separate, registered NGO, with its own board, to more effectively run its travelers' philanthropy program.

In New York City, New York Restoration Project (NYRP), founded by singer and actress Bette Midler, works with volunteers to plant trees and revitalize parks, gardens, and natural spaces in order to create a cleaner, greener urban landscape. NYRP also runs the New Leaf Restaurant & Bar which, through its proceeds and donations solicited from guests, is providing about \$50,000 a year to support the work of the NYRP. This is an innovative example of an NGO creating a for-profit tourism business to underwrite its mission delivery and developing a travelers' philanthropy component to solicit visitor contributions.

Some giving programs are more than "add ons" to the tourism business; they are part of the business structure of the company. One of the most unique fundraising models has been Loreto Bay, a resort and vacation home complex in Baja California Peninsula, Mexico. The Master Development Agreement for the Villages of Loreto Bay designated that 1% of gross sales of homes and condos go to The Loreto Bay Foundation to support community projects and the Loreto Bay National Park. This fund raised over \$1 million between 2004 and December 2008, when the economic crisis hit and the company was put up for sale. This model of incorporating a contribution to local causes from property sales is now being used in several other resort and vacation home developments in the Americas.

Yet another approach to travelers' philanthropy is set forth in three examples of tour companies whose central mission is philanthropy. These are:

1. **Global Sojourns'** Giving Circles (GSGC) is a membership organization that hosts trips to southern Africa to visit community-based organizations focused on assisting children and supporting education. After visitors return home, they continue to be part of the Giving Circle through quarterly conference calls, and work to raise funds to support the projects.
2. **Elevate Destinations** was launched in 2005 as a philanthropic and sustainable travel company providing "responsible travel" opportunities for individuals and institutional clients. It specializes in providing donor travel programs for international non-profit organizations (such as Global Fund for Children and Rare Conservation) to highlight their successful projects in developing countries. The company donates 5% of the net cost of its trips to NGOs in the host countries. In addition, donations are built in to the cost of the trip



Plan USA trip to Ghana.
Credit: Elevate Destinations

and/or travelers are encouraged to contribute to the sponsoring organizations and local projects visited.

3. **GoPhilanthropic** was created in 2007 as a socially conscious travel company. Its educational trips are designed as “door-openers” to connect travelers with local social, health, and development projects in Asia, Africa, and Central America. Its travelers, who are all self-identified as being interested in philanthropy, commit to make contributions to specific projects either before or after visiting them. Donations go directly to the partner organizations, which send regular reports to the donors and to GoPhilanthropic.

- **Corporate and Staff Involvement**

All of the companies highlighted in the case studies are making some level of corporate financial and in-kind donations, and they are providing opportunities for their guests to learn about and contribute to community and conservation projects in the host destinations. Several companies report that they began their travelers’ philanthropy programs at the suggestion of guests who wanted to help address needs they were seeing. For instance, Calabash Tours began informally with guest donations of pens and small amounts of money and gradually has moved from that “donor-driven” model to a “needs-focused” development model aimed at improving schools in the Port Elizabeth townships.

In all instances companies are involving their staff in some way. There are varying degrees of staff participation and training, depending largely on the company’s method of securing and distributing donations. Vail Resorts provides staff training to reservation agents, front desk personnel and others who interact with guests so those people can encourage visitor participation in the voluntary giving initiative. Intrepid field staff and group leaders are involved in selecting projects, carrying out due diligence, and encouraging guest donations via their website, while other staff is involved in monitoring and evaluation of the recipient projects. Country Walkers’ Patacancha project demonstrates the catalytic role the tour guide can play in educating travelers and generating contributions. (See “My Role as a Guide”, Chapter 6).

Authors of these case studies report that travelers’ philanthropy helps build staff pride in the company. They say that staff appreciates being engaged in local ‘give back’ programs and that these programs increase staff retention. Intrepid Travel offers payroll deductions for employees who wish to support projects through regular donations. Vail Resorts provides for staff to participate in volunteer projects, such as tree planting, alongside guests. The writers also note that successful travelers’ philanthropy programs enhance the image of their tourism companies as good citizens in the communities where they operate. In addition, the projects can enrich the travel experience by bringing more intimate, organized, and meaningful interactions between travelers and local people.

All writers of these case studies report that their companies’ travelers’ philanthropy programs have had a positive impact on business: Jane Crouch states that Intrepid’s philanthropic activities have “definitely helped our business reputation and success.” She says that “40% of our customers list ‘responsible travel’ as one of their top three reasons for choosing to travel again with Intrepid.” Similarly, Maria Barquero writes that Punta Islita’s community projects have “definitely helped” to build “a healthy relation with community and the recovering ecosystem has made this a more attractive and unique destination.” In addition, she writes, the hotel’s “green” personality attracts a better clientele.

- **Fundraising Techniques**

The total amounts raised by the companies and their foundations profiled in these case studies range from about \$50,000 to about \$10 million. The companies list a wide range of ways in which funds are raised, some obvious and others quite innovative. Intrepid gives visitors an incentive to donate by matching all donations, dollar for dollar, and Intrepid covers all administrative costs so that visitor donations go 100% to the designated projects. At Vail Resorts, guests have an opportunity to contribute \$1 each on purchases of season ticket passes, online lift ticket transactions, and for each night of lodging. In Colorado, the National Forest Foundation matches Vail's visitor contributions with \$.50 for every \$1 donated so that a total of \$1.50 goes to on-the-ground conservation projects.

The size of individual gifts from travelers range from \$1 contributions from many guests to large contributions from high-end travelers who are moved to support specific projects they have visited. Several companies, including Myths and Mountains, Punta Islita Hotel, and Calabash Tours, also have successfully solicited grants from philanthropic foundations to supplement guest donations.

The case studies describe that companies are promoting their travelers' philanthropy initiatives through a range of common sense visitor education and solicitation tools. These include dedicated websites and special web portals, brochures, emails, guide and staff presentations, and talks by community representatives. IGTOA has developed series of videos describing issues in the Galapagos and how visitors can help. CREST's travelers' philanthropy video documentary, "Giving Time, Talent and Treasure", showcases a number of travelers' philanthropy programs, including Basecamp Masai Mara in Kenya and the Sarapiquí Conservation Learning Center (SCLC) and Punta Islita in Costa Rica. Several companies report they are also using social media such as blogs, Facebook, and Twitter to tell guests about their travelers' philanthropy projects.



Only about half of the companies in these case studies say that they have legal structures to permit contributions to their travelers' philanthropy projects to be tax deductible. Calabash Tours, for instance, has NGO partners in the U.S. and UK that collect and channel tax deductible donations to its projects. Holbrook Travel's SCLC has created a nonprofit in the U.S. to accept tax deductible donations. On the other hand, several companies say that tax consequences are not important to their donors. This is probably especially true when the usual donation is relatively small, say below \$200 U.S. The consortium of Galapagos tour companies, IGTOA, has not incorporated as a non-profit because the organization's leaders don't believe it would increase traveler donations. Companies operating outside of the U.S. may not be able to offer tax deductibility to their guests. Under Australian tax law, Intrepid is not able to offer tax deductions for donations to community projects in other countries.

These case studies offer several innovative solutions to the critical issue of sustainability: how to ensure the projects receive sufficient resources over time and gradually become self supporting. Calabash Tours has recognized that sustainability requires higher capital inputs than were coming through visitor donations, so its Trust also solicits support from traditional donors and foundations. Today the Trust has six full time employees to solicit donations, communicate with

donors, and monitor projects. IGTOA charges a membership fee which provides funds for its basic operating expenses. Loreto Bay's master plan stipulated that 1% from the gross sale *and resale* of vacation homes go to the community foundation, thereby ensuring a continuing stream of income. Similarly, the NYRP's New Leaf Restaurant is providing a steady income to support its urban garden projects. Both Myths and Mountains and Selva Verde Lodge/Holbrook Travel began by building library/community centers which have then grown to encompass a range of other community projects and income generating activities that help finance the library complex.

- **Voluntourism**

While all these companies are providing “treasure” – money and material goods – to the projects they support, they hold mixed views of voluntourism. Four of the companies that provided case studies do not offer guests volunteer opportunities. They cited a number of reasons: work on local projects can and should be done by residents so that they feel ownership (Myths and Mountains), volunteers can take jobs from locals (Intrepid and Global Sojourns), and financial investments do more good than volunteering (GoPhilanthropic).

Most of the companies that place volunteers in their projects do so in a well-organized manner. Calabash Tours has worked with a UK partner organization to create a self-funding voluntourism program that only accepts volunteers with specific skills and requires them to stay for a minimum of one month. Calabash finds that volunteers benefit the project by transferring skills to local participants and taking their inspiration and understanding back to their home communities thereby building wider networks of contributors.

- **Key Lessons**

The case studies highlight a number of challenges that companies face in setting up effective travelers' philanthropy programs. These include:

- How to identify projects that are priorities for the host community instead of those that seem important to the company or visitors;
- How to select and manage voluntourism projects that are appropriate and beneficial for the host community; and
- How to offer appropriate site visits recognizing they are important to visitors and may help secure additional funding but can be disruptive for the local organizations.

These case studies also contain a number of keys to success and best practices that are components of successful travelers' philanthropy programs. Some of these take aways are:

- Identify or create a local foundation or other structure separate from the tourism business to receive contributions and run travelers' philanthropy projects;
- Ensure transparency in how contributions are used, including regular auditing and reporting to donors;
- Support needs-focused rather than donor-driven projects;
- Build in mechanisms for sustainability through local income-generating activities (or sources of revenue other than the travelers, including foundations);
- Make travelers' philanthropy an integral part of company's business plan and corporate social responsibility strategy, and not simply an add-on activity; and
- Engage in continual and honest assessment and evaluation, recognize and learn from mistakes, and strive for improvement.

Case Studies:

Intrepid Travel and The Intrepid Foundation

By Jane Crouch

Responsible Travel Manager, Intrepid Travel

Intrepid Travel (www.intrepidtravel.com) headquartered in Melbourne, Australia, takes r 100,000 travelers to over 100 countries worldwide, each year. We employ close to 1000 staff and have offices in 20 countries. Intrepid offers over 8000 departures a year using around 1000 different trip itineraries, specializing in small group adventure trips ranging in style from Basix (budget), Original, to Comfort, with themes including: Urban Adventures, Family, Short Breaks, Active, Overland, Marine, Wildlife, Festivals, Schools, and Private Groups.

- **When and Why Did You Begin Your Company's Travelers' Philanthropy Program?**

Intrepid's travelers' philanthropy programs commenced with the inception of Intrepid Travel in 1989. They became part of The Intrepid Foundation (TIF) in 2002 (www.theintrepidfoundation.org). The company's philanthropic support is very much part of the founders' (Darrell Wade and Geoff Manchester) core values and commitment to contributing to visited communities not just by bringing business, but helping to address specific needs that could benefit from the company's support.



The Intrepid Foundation (TIF) was established in 2002 as a separate entity to:

- Enable our travelers to support the projects that Intrepid Travel supports
- Provide better accountability and transparency to our philanthropic activities; and
- Provide more consistent community support, a step removed from Intrepid Travel business.

- **How Do You Select Projects?**

The Intrepid Foundation offers donors two ways to support our work:

- The Intrepid Perpetual Fund - which supports a number of well-known and respected international NGO partners. (In 2010 there were 10 key partners.)
- The Intrepid Community Project Fund - which generally supports smaller grassroots NGOs, including many which may be visited during an Intrepid trip. (In 2010 there were 40 organizations/projects.)

If an NGO appears to be a suitable beneficiary for the Intrepid Community Project Fund, and their work is of interest to our staff and travelers, we have a senior Intrepid employee complete an application form and address criteria to assess if the organization is:

- Operating as a not-for-profit organization.
- Community-based in both aims and operation, i.e., community members are involved in the planning, development, delivery, and/or evaluation of the work.
- Addressing a clearly identified need.
- Not primarily established to serve a religious purpose.

Our selection criteria also evaluate the degree to which the project and/or the organization or individual managing it is:

- Open and transparent in their decision making and financial management (they should be happy to show us their budget and accounts).
- Able to demonstrate a cost effective method of operation.
- Accepted and respected in the local community.
- Focused on the poor and marginalized within the community (where applicable).
- Environmentally sustainable.
- Aimed at raising the self reliance and skill base of the community

We work with the most suitable person in the organization, which may be the manager or the person most involved with the area of the organization's work that is the most suitable for us to support.

Some examples of organizations supported by The Intrepid Foundation (TIF) are:

- **Beijing Huiling, China**

This organization provides residential and education services at a center for people with disabilities. Many Intrepid travelers to China visit this center where they are given a calligraphy or music presentation by the residents, learn about their needs, and may purchase handicrafts. The Intrepid Foundation has raised more than AU\$35,000 for this NGO's work.

- **Spring Bud Plan, China**

This organization helps girls who have dropped out of school to return to school. Although Intrepid travelers do not visit an actual site, they see 'the issue' on the streets, i.e., young girls selling roses at restaurants at 10pm. TIF has raised more than AU\$56,000 for this organization, allowing 227 children to attend primary school. Our 2009 donation helped young victims of the Sichuan earthquake to return to school.

- **UXO Lao, Laos**

This is another organization that Intrepid travelers support, even though there is limited visitation to the project site. During their trip, travelers learn that more than 40% of Laos is still contaminated by landmines and unexploded ordinance (UXO). The donations given through TIF support UXO Lao's community awareness education programs, specifically educating children about the identification of and dangers of UXO. Over AU\$30,000 has been raised.



- **Amani Children's Home, Moshi, Tanzania**

We 'inherited' supporting this fantastic center for former street and working kids from Guerba Expeditions. Guerba raised significant funds towards the building of the center. Intrepid travelers now support the project. Travelers may visit the center as part of an Intrepid trip.

- **Living Heart, Peru**

Intrepid groups visit several impoverished communities high in the Sacred Valley in Peru. Trips go to the 'Hearts Café' where participants learn about the Living Heart project, which brings health and nutritional support to these communities. The project aims to improve the lives of disadvantaged children in particular. One part of the program provides children with a nutritious breakfast before they go to school, so they can concentrate better and learn more in class.



- **How are Your Employees and Your Company Involved in the Philanthropy?**

Intrepid Travel employees in the field may propose suitable NGOs and projects for possible financial support. After scrutiny and due diligence examination by the Foundation's disbursements working group, a project may be selected to be an Intrepid Foundation beneficiary. Intrepid field staff and group leaders promote the projects to Intrepid travelers by arranging visits and encouraging donations via our web-site. Selected staff are also involved with project monitoring and evaluation. Some staff in our head office are involved in the Management Committee, or through working groups in: Promotions and Communications, Income Generation or fundraising, and Disbursement- conducting the due diligence and selection of beneficiary organizations.

- **What Have Been Staff Reactions?**

Staff members like having real opportunities to contribute to the communities where Intrepid Travel operates. They also appreciate being engaged in the project selection process and learning about positive and sustainable development. Staff say that active involvement in supporting communities where Intrepid works is one of the reasons they choose to work at our company. It contributes to keeping them inspired and proud of where they work.

- **Have You Provided Staff Training to Support the Philanthropic Work?**

We have specific training modules for both our office-based staff and group leaders to teach them how The Intrepid Foundation operates and how they can effectively engage staff and travelers in supporting The Intrepid Foundation and its projects.

- **How are Funds Actually Raised from the Travelers?**

Our staff, our travelers, and other Intrepid stakeholders learn about the issues and the organizations and projects that The Intrepid Foundation supports. This knowledge leads to the

desire to donate. Giving to these causes and projects through The Intrepid Foundation is especially attractive because donors know that 100% of their donation will reach their chosen project, because Intrepid Travel funds all administration costs. As an additional incentive, Intrepid Travel will match their donation dollar for dollar - thereby doubling the traveler's contribution. Currently Intrepid matches up to AU\$400,000 for any given financial year and to a maximum of AU\$5,000 in total per donor for the financial year.

- **How Do You Solicit Donations?**

There is information about The Intrepid Foundation and its projects in *Trip Notes* (received at the time of booking with Intrepid), on our web-site, in brochures, newsletters, advertising material, and in post trip emails. Intrepid group leaders talk to their travelers about how they can support TIF projects. Donors can donate online via The Intrepid Foundation web-site, or in cash at selected Intrepid bases where there are cash collection tins (preferably just for smaller amounts/loose change as we do not issue receipts for these smaller amounts). We also offer other donation opportunities through special or emergency appeals (tsunami, earthquakes etc), Global Gifts - a donation that can be given in lieu of a gift for someone, that is acknowledged in a gift card; and payroll deduction for employees. We hope to soon also offer an opt-in contribution option at the time of booking a trip.



- **Are Donations Tax Deductible?**

Australian donors can receive a tax deduction for donations made to the Intrepid Foundation's Perpetual Fund. We are, at the time of publication, unable to offer tax deductibility for donors to The Intrepid Community Project Fund as few of the beneficiary charities have any formal recognition in the Australian taxation system.

- **Do Travelers Visit the Project Sites?**

As described in the examples above, some organizations and projects accept visitors while others do not, or keep visits to a minimum, for example, no more than once a fortnight. Some projects address an issue that is widely visible so a site visit is not necessary. For instance, the Intrepid Foundation supports the charity 'Deepalaya' in India that provides welfare and education for former street and working children, but groups do not visit this organization. One trip through a bus or train station in a large Indian city illustrates the plight of disadvantaged and homeless children.

- **Do You Offer Opportunities for "Voluntourism"?**

We do not offer voluntourism opportunities connected to The Intrepid Foundation, as generally we are supporting organizations and local people that are doing the work themselves.

- **What Type of Educational Materials do You Give to Travelers?**

Information about the issues and projects are disseminated through trip dossiers or notes, during Intrepid trips by group leaders, through the *Intrepid Express* weekly e-newsletter, and on The Intrepid Foundation web-site: www.theintrepidfoundation.org.

- **How are Funds Distributed?**

Funds are disbursed by bank transfer to the beneficiary organizations once a year, after the close of the financial year and after the auditing of our accounts.

- **What is the Structure to Ensure Accountability?**

The use of the funds is negotiated between The Intrepid Foundation and each organization. At the time of each year's disbursement, priorities are discussed and an agreement is reached regarding how that year's funding will be used. Each recipient organization is required to provide a report and photos to demonstrate how the funds were used (or a progress report if the project is not yet complete). They are also visited by local Intrepid staff who verifies that the funds were used in accordance with the agreement. The Intrepid Foundation is registered with Australian statutory authorities, and has annual reporting accountabilities.

- **How Much Has Been Raised?**

Since The Intrepid Foundation's inception in 2002, over AU\$2.2 million has been disbursed. Another AU\$240,000 (as at Nov 2010) is being invested and held for longer term project support.

- **Has Your Philanthropic Program Helped, Hurt or Had No Impact on Your Business?**

Intrepid's philanthropic support is one component of Intrepid Travel's broader Social Responsibility and Sustainability strategy. Being responsible corporate citizens has definitely helped our business reputation and success. We know that 'Responsible Travel' is one of the top three reasons why around 40% of Intrepid's customers choose to travel with Intrepid again.

For more information contact:

Jane Crouch: jane.crouch@intrepidtravel.com

Websites: www.intrepidtravel.com; www.theintrepidfoundation.org

Myths and Mountains and READ Global

By Antonia Neubauer, Ph.D.

Founder, READ Global and President, Myths and Mountains

Myths and Mountains (www.mythsandmountains.com), located in Incline Village, Nevada, is an educational adventure travel company, designing programs that feature the cultures and crafts, religions and pilgrimage sites, traditional medicines, and environment and natural history of the



Myths & Mountains Trekkers, Nepal. Credit: Toni Neubauer

countries they visit. The company specializes in Asia, Southeast Asia and South America and has been in business since 1988. Small group departures, customized trips and outstanding customer service for discerning travelers are Myths and Mountains' specialties. Every detail is handled professionally by skilled staff and coordinated with local partners in the field. Qualified and experienced in-country guides are used whenever possible.

Myths And Mountains has been recognized by The Robb Report, Condé Nast Traveler Magazine, Travel & Leisure, The New York Times, National Geographic Traveler, and National Public Radio, among many other guidebooks, media sources and publications.

Most recently, the company was named one of "Travel & Leisure" magazine's "2010 Ultimate Adventure Outfitters From Around the Globe" and also won their 2010 Travel Vision Award for their contribution to literacy in Nepal and now India and Bhutan. Dr. Antonia (Toni) Neubauer, president of Myths and Mountains, is the 2010 Condé Nast Nepal Travel Specialist.

- **When and Why Did You Begin a Traveler's Philanthropy Program?**

Because Myths and Mountains was offering their guests intimate glimpses of how people lived, worked, and worshipped in their faraway worlds, the company wanted to give something back to the local people – helping to make their villages a viable place for them to live, learn and prosper.



READ Global Library, Nepal. Credit: Toni Neubauer

When a trek leader in Nepal mentioned he would like a library in his village, Toni thought that was a brilliant way to leverage scarce resources, build a library community center in a village, and provide materials in the local

language to villagers from pre-school to adult. This became the concept behind the READ Centers.

In 1991, the first Rural Education and Development (READ) Center was opened in Junbesi, in the Solu Kumbu area of Nepal. Today, 20 years later, that Center is still in operation. READ has also become its own 501c3, with a separate office in the Presidio in San Francisco, its own board, and staff. Each READ Center has a library with:

- A reading room with 3000-5000 books in the local language, newspapers and magazines.
- A children's room with toys, games and books for the young, as well as appropriate small tables and chairs.
- A women's room.
- An audiovisual room.
- A computer room.
- A meeting room for local people.
- Because too many projects started by well-intentioned donors fail for lack of funds, Myths decided to seed a local business in the community, and the profits from the business would fully sustain and support the libraries. Among the local businesses established to support the READ Centers are ambulance service, a furniture factory, storefront rentals, sewing, catering service, and fish ponds.
- Lastly, in order to make the READ Center the hub of village activity, the library was linked to other organizations providing literacy training, micro-credit, health and HIV/AIDS care, women's empowerment, agricultural training, and other services.



Kids watching computers, Bhutan.
Credit: Toni Neubauer

In 2006, READ Nepal won the Bill and Melinda Gates Foundation's \$1,000,000 Access to Learning Award. Then, a year later, it received a 4-year, \$3,000,000 replication grant from the foundation to expand into other countries. As of this writing, READ has built more than 50 READ Centers across Nepal and has opened offices in Bhutan and India.

Along the way, READ has collaborated with many organizations, including UNESCO, JAICA, NORAD, The Annapurna Conservation Company, The Asian Development Bank, the German Embassy, Bhutan's Royal Education Council and others.



READ Global Library, Nepal. Credit: Toni Neubauer

• How Do You Select Projects?

READ does not solicit projects. Rather, villages submit proposals to the READ country office. READ country staff review the proposals, and, with the support of the advisory board and READ Global office, select the next READ Center sites. Generally speaking, READ looks for a village

with a secondary school and a hub of elementary schools nearby, good local leadership, and interest and participation from the villagers.

READ contracts directly with villagers to build the library/community centers. The village registers and becomes an NGO, and opens up a bank account. Villagers also choose a management committee (LMC), and 1/3 of this committee must be women. READ works with the LMC members and others in the community to build and stock the library, train the local librarian, and provide support and monitoring after the center is finished. READ also seeds the local business selected to be the sustaining project. Before construction begins, all village stakeholders have to sign a contract, so their roles and responsibilities are clearly understood and delineated.

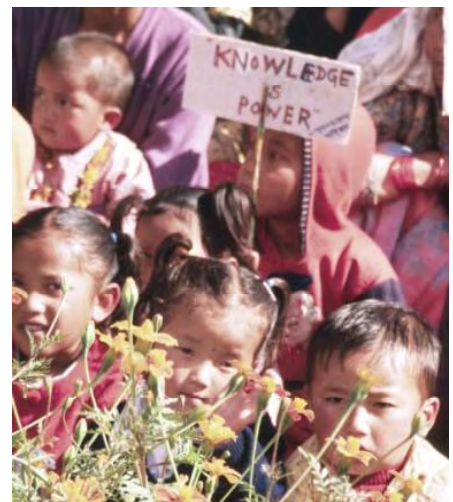
The READ library community center benefits most people in the community. Students have books to enjoy, teachers have reference materials, pre-schoolers have books and toys, all people have access to computers and audio-visual materials, and adults also have access to books and information – all in the local language.

The sustaining project not only supports the READ Center, but often generates extra money for other community activities – stipends for poor children, jobs, a pre-school teacher – whatever the community wishes.

- **How are Your Employees and Your Company Involved in Traveler's Philanthropy?**

Myths and Mountains supports READ in numerous ways.

- Staff volunteer their time to help with local READ fundraisers, particularly the large fundraiser held in Incline Village, Nevada.
- Myths operates 2-3 READ trips a year to sites in Nepal and Bhutan, and each participant donates money to READ in order to travel on the program.
- Myths president, Toni Neubauer, donates her time to travel on the READ trips.
- Myths and Mountains' actively encourages its clients to contribute to READ and gives information about the program to every traveler.
- Myths helps READ design trips for special donors on request.
- With the permission of its travelers, Myths shares database information with READ.
- Myths regularly donates a portion of its earnings to READ.
- Myths generates publicity for READ and READ travel through its marketing and PR.
- Myths includes mention of READ in its catalog and on its itineraries.
- In countries where Myths and READ operate, Myths operators have also helped the in-country READ staff to service potential donors and others, guide them around the country, and show them READ Centers.



Children at READ Global event, Nepal.
Credit: Toni Neubauer

- **What Have Been Staff Reactions?**

Many of our employees chose to work with us, because they felt that Myths and Mountains made a real contribution to world education and development, that the organization was not just interested in making money, but in helping people to help themselves. Myths employees are very proud of their contribution to development and feel they are truly making a difference in people's lives.

- **Have You Provided Staff Training to Support the Philanthropic Work?**

Myths staff in America have attended READ benefit programs and are able to explain the program to those they meet. In countries where READ operates, Myths and Mountains has taken its operators and guides to see READ projects, get involved, and encourage clients to contribute. In some cases, Myths and Mountains has had staff visit the libraries.



- **How are Funds Actually Raised from Travelers?**

Funds are raised in several ways.

- First of all, on a READ trip, above and beyond the regular trip price, travelers are asked to contribute \$300 to READ Global. Because this check is made out to READ, it is also tax deductible to the traveler.
- Secondly, each year, Myths and Mountains sends out a letter to its travelers and others in the data base, asking them to contribute to READ. All those who do contribute become part of the READ permanent database.
- Third, when clients return from a trip, Myths always sends a flier with information about READ and how to contribute to it.
- On a trip, when travelers visit a READ library/community center, sometimes they bring money for buying books, or offer to help with something else for the center that is needed – a stove or some cushions, for example.
- Lastly, when READ hosts a fundraising dinner or activity in a particular area, Myths and Mountains invites its local clients to attend, learn about the program, and donate, if they choose.

- **How Do You Solicit Donations?**

Donations are solicited in a variety of ways, including:

- Twice a year, READ sends a letter to the donors on its database. Myths sends out a personalized version of this solicitation letter to its travelers, telling them about READ and asking them to send contributions to the READ Global Office in San Francisco.
- Travelers who participate in the READ trips are asked to contribute a specified tax deductible sum to READ Global as part of the travel suggestions.
- Each returning Myths traveler receives a READ brochure with their trip evaluation package and a note about the organization.
- During trips to Nepal, Bhutan and soon India, we try and take guests to see the READ projects. Often the guests ask what is needed and what they can do to help.
- When READ has fundraisers in different areas, Myths and Mountains sends invitations to their travelers who live nearby.
- Once a year, in Incline Village, the home of READ, Myths sponsors a large fundraiser, bringing in world-renowned speakers or performers. At that time, Myths and READ actively solicit funds from attendees.

- **Do Travelers Visit the Project Sites?**

On READ trips to Nepal and Bhutan, travelers visit several READ libraries in different parts of the country, visit the READ office, meet with the local villagers who use the libraries, and spend time with local advisory board members. As libraries are finished in India, these sites will also be included in programs.

On non-READ trips, Myths and Mountains tries to include visits to READ sites, when they fit with the program, or to other libraries in countries where READ does not have their centers.



Gathering at READ Global Library, Nepal
Credit: Toni Neubauer

- **Do You Offer Opportunities for Voluntourism?**

Tourists can bring books or other materials with them on READ trips, but Myths does not specifically involve tourists in building the libraries. READ's philosophy is that the construction and oversight needs to be done by the local community. If tourists build the library, villagers do not have the same sense of personal ownership. READ is about a "hands up, not a hand out!"

- **Are Your Philanthropic Programs Advertised on Your Website?**

Yes, the READ programs are advertised on the web and there is a direct link to the READ website. Also, Myths and Mountains talks about READ on its Facebook and Twitter sites.

- **How are Funds Distributed?**

Myths and Mountains sends all funds raised to READ Global. READ Global distributes these funds according to its budget and strategic plan to the different library sites. In some cases, travelers restrict their donation to something special – a women's center or computers, for example. In that case, Myths and Mountains will make sure that READ Global puts these monies into a restricted account that does what the donor wishes. The READ tax forms are available on their website for all to see. And READ is audited yearly.

- **How Much Has Been Raised.**

About \$10,000,000 over the past 20 years.

For more information contact:

Toni Neubauer: toni@mythsandmountains.com

Website: www.mythsandmountains.com and www.readglobal.org

International Galapagos Tours Operators Association (IGTOA)

**By David Blanton
Executive Director, IGTOA**

The International Galapagos Tours Operators Association (IGTOA) is a U.S. registered nonprofit organization composed of approximately 50 tour operators, conservation organizations, and other groups that are dedicated to the complete and lasting protection of the Galapagos. (<http://www.igtoa.org>) The companies that have been especially active in IGTOA include: Ecoventura-Galapagos Network, Adventure Life, Wilderness Travel, Holbrook Travel, International Expeditions, and Myths and Mountains.

IGTOA's mission is to preserve the Galapagos Islands as a unique and priceless world heritage that will provide enjoyment, education, adventure, and inspiration to present and future generations of travelers. Membership is open only to commercial and nonprofit organizations. However, IGTOA welcomes the involvement of individuals, who can sign up at the website to receive Action Alerts, advocate for key legislation and governmental policies, and support important projects. Full membership costs \$600 per year. Associate membership is \$250 per year. Administrative expenses are kept to an absolute minimum. Most of the work of IGTOA is done by Board Members, who volunteer their time.

Activities of the association include:

Funding Projects -- Member companies contribute part of their profits to fund worthwhile projects for organizations such as the Galapagos National Park, WildAid, and the Charles Darwin Foundation. A description of these projects is included on the IGTOA site.

Lobbying for Conservation -- We use our collective voice to petition the government of Ecuador for proper funding, management, and legal enforcement. And we support and encourage local people of the Galapagos to be stewards of their own natural heritage.

Promoting High Professional Standards -- IGTOA members work for high professional standards for the welfare and enrichment of their travelers. These include boat safety and emergency procedures, as well as training of captains, crews, and guides.

- **When and Why Did You Begin Your Travelers' Philanthropy Program?**

IGTOA was founded in 1995 by a core group of tour companies in response to growing threats to the Galapagos Island. From the beginning, the intent was to give back to the islands in the



Iguana in the Galapagos. Credit: IGTOA

form of education, lobbying, and funding. Membership has steadily grown over the years so that by 2010, full members totaled about fifty.

- **How Do You Select Projects?**

IGTOA solicits proposals from key organizations working in the islands. It works closely with the Charles Darwin Foundation which does critical scientific and conservation work. In addition, it funds programs by WildAid which is active in the Marine Reserve. It also supports Conservation International, the Galapagos National Park, CAPTURGAL (the local chamber of tourism), and other organizations. Once projects are proposed, they are voted upon by the Full Members of IGTOA during the annual meeting.

- **How are the Company and its Employees Involved in Philanthropy?**

Member companies assign someone to coordinate with IGTOA, and usually this is the Galapagos or South American destination manager. Company management is usually involved, sometimes serving as officers on the board. The IGTOA Executive Committee comes from the membership and each officer serves, without pay, for two years.

There is a part time Executive Director who handles the administration, communication, annual meeting, proposals, voting, and other matters. This person works for a modest salary.



Scalesia school conservation project, Galapagos.
Credit: IGTOA

- **How are the Funds Actually Raised?**

IGTOA generates income from membership dues and two forms of donations. Annual dues pay for much of the administrative cost. But donations provide the revenue used to fund projects.

The American Institute of Philanthropy recommends that at least 60% of a nonprofit's revenues go toward programs. IGTOA does considerably more than that. Just 15% of our income goes to administration, and 85% is distributed to program funding as follows:

- 45% IGTOA's Conservation Fund.
- 40% Professional Standards Fund (visitor experience, safety, quality).
- 15% Development Fund (education, communication, lobbying).

Donations come from two sources:

- Some members are part of IGTOA's Traveler Funding Program. Under this program, members put a \$50 optional line item in the invoices of their Galapagos travelers. A large percentage of travelers pay this as a donation.
- The second way companies can participate in funding is to simply pay \$7 for each traveler they send to the Galapagos. This type of funding produces much less, however, and is being phased out.

- **Do You Incorporate Tax Deductible Donations?**

Because IGTOA does not have 501(c) 3 charitable status travelers' donations are not tax deductible. However, in our experience, getting a tax deduction for a \$50 donation is not important for most of the Galapagos travelers.

- **What Type of Educational Materials Do You Give to Travelers?**

Companies participating in the Traveler Funding Program give brochures to their travelers explaining the need, and they also refer them to a set of online videos that show the challenges facing the Galapagos, best practices for travelers and boats, and best safety practices on their trip. The videos were produced by IGTOA with a grant from Conservation International.

- **Do Travelers Visit the Project Sites?**

The tours all take place in the Galapagos, although different itineraries and companies visit different islands and feature a variety of activities. So travelers see the resources and issues firsthand. Most tours also visit the Charles Darwin Research Station and National Parks headquarters.

- **Is Travelers' Philanthropy Promoted on Your Website and/or in Your Advertising?**

IGTOA's site encourages individual giving. Many of our members' websites seek to educate travelers about sustainability and inform them about IGTOA and its objective.



- **How Much Has Been Raised? How are Funds Distributed?**

After the initial founding of IGTOA in 1995, membership and funding grew slowly. Over the years, however, funds raised have become more significant. Recent funding is as follows:

- 2006 \$40,586 U.S.
- 2007 \$95,610 U.S. (the first year of the Traveler Funding Program)
- 2008 \$92,887 U.S.
- 2009 \$89,528 U.S.

At present, contributions come in equal amounts from travelers and company membership dues.

Recent projects funded have included:

- Science & Conservation at the Charles Darwin Foundation.

- Protection of the Marine Reserve: for the Galapagos National Park to provide patrols to protect shark and sea lions.
- Conservation Education: Scalesia Foundation for a pilot program on environmental education and teacher training workshops.
- Preventing Introduced Species: fumigation of aircraft.
- Galapagos Park Maintenance: for the Galapagos National Park to provide maintenance for patrol boats.
- Visitor Education: Professional Standards Fund for the Charles Darwin Foundation, for an education specialist at the visitor center.
- Shark protection: a floating platform in the northern part of the islands to monitor illegal shark fishing in this remote area.

- **Has Your Philanthropic Program Helped, Hurt, or Had No Impact on Your Business?**

Member companies report that their business is improved by being part of a professional organization that is giving back to the Galapagos. Potential travelers are usually conservation minded, and they look for a company that matches their concerns about the environment. Members can show that they are involved, and they can actually do more through a coordinated effort than they can do on their own.

For more information contact:

David Blanton: dave@dfblanton.com

Website: www.igtoa.org

Holbrook Travel and Sarapiquí Conservation Learning Center

**By Andrea Holbrook
President, Holbrook Travel**

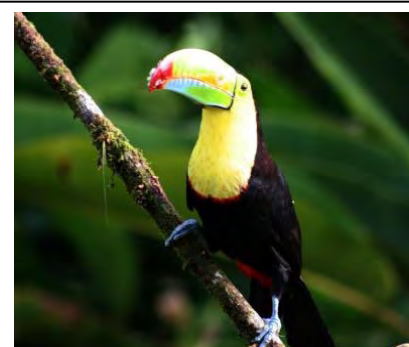
Holbrook Travel (www.holbrooktravel.com), based in Gainesville, Florida was founded in 1974 by Juan and Giovanna Holbrook. It specializes in affordable educational and natural history travel programs to Latin America, East Africa, and beyond, with an emphasis on facilitating a true connection between travelers and the diverse habitats and cultures of the world. Currently it has 24 full-time employees and serves between 5,000 – 7,000 travelers per year.

Giovanna Holbrook also founded the 50 room Selva Verde Lodge (www.selvaverde.com) based in Sarapiquí (Heredia), Costa Rica. Selva Verde was started in 1985 to conserve over 500 acres of lowland tropical rainforest. It prides itself on being the premier rainforest retreat in Sarapiquí, the ideal gateway through which to explore the tropical rainforest, enjoy nature and adventure activities and connect with the local community. There are kilometers of trails around the grounds through the forest reserve for optimal bird watching and nature viewing. The Lodge hosts about 8,000 people per year and employs about 40 people.

Holbrook Travel and the Selva Verde Lodge provide support to the Sarapiquí Conservation Learning Center (www.learningcentercostarica.org), a non-profit U.S. registered 501(c) 3 organization based next to the Selva Verde Lodge. In Costa Rica, the organization is known as *Centro de Aprendizaje para la Conservación en Sarapiquí* (CECOS).

- **When and Why Did You Begin a Travelers' Philanthropy Program?**

Our philanthropic efforts are directed toward the Sarapiquí Conservation Learning Center (SCLC) exclusively because of its connection to our company and the Lodge. The Center started in 1993 through the initiative of Selva Verde Lodge's first manager, Bertha Carter, with the financial support of Giovanna Holbrook. During the years that she was the manager, Bertha, who was born and raised in Bolivia and trained as a nurse, cultivated strong relationships with the community, especially the young people and the women. She supported a group of young naturalists from the area who she introduced to Selva Verde's guests, many of whom were researchers or scholars in ecological and environmental disciplines. In this way, an informal educational exchange took place, to the delight of visitors and the benefit of local young people.



Toucan, Costa Rica.
Credit: Holbrook Travel

To further the exchange and the education of the young naturalists, Bertha asked Giovanna Holbrook to fund a library of donated books. The idea evolved into the building of the Center

which was completed in 1993. From the beginning, the mission of the Center was to serve as an educational resource to support conservation at Selva Verde. However, it was not clear how the Center would be financed or what programs it should offer. In addition to the library, the Center had volunteers teaching English and a scholarship program, financed by visitors that underwrote the costs for local youth to attend high school.

Most of the funding to cover the initial, very modest operations of the Center came from Holbrook Travel and Selva Verde Lodge, either through company or guest donations or donations in kind. In 2002, one of the Center's Directors, Polly Hunt, decided to offer cultural and educational activities to U.S. travelers, especially groups of high school students and teachers. And a marriage made in heaven was born. Holbrook was working with many educational groups and the Center began generating enough income to support its operational costs through such offerings as: local dance classes, service activities in the Sarapiquí area, etc.



- **How Do You Select Projects?**

SCLC offers both “programs” in the form of courses run by the Center for members of the community and “projects” which are community service activities undertaken by tour groups under the umbrella of SCLC’s Rural Community Tourism.

How we selected the programs we offer at the Center: The programs offered at the Center have evolved over its 15 year history. The library was the initial undertaking because Bertha Carter’s group of young naturalists asked for it. The English classes were added because the first volunteers and directors of the Center believed the classes fulfilled an important need. Skilled volunteers from the U.S. and Canada with ESL experience are relatively easy to find so it was a simple program to add. The Scholarship program and After School Program evolved out of the Center’s work with young people.

How we select service projects or other community works: Over time, the Center identified several communities in the area that became the focus of our Rural Community Tourism work. They were chosen because both their proximity and their needs are a good match to the Center’s capacities.

These communities have local leaders with whom the Center maintains contact through regular meetings. One of the only 3 paid employees at the Center is responsible for cultivating relationships with community leaders so that we will be informed about local needs and resources.

Revenue is generated from travelers from the U.S. and Canada who pay to participate in the wide range of rural community activities offered through SCLC. These include classes in handicrafts, cooking, ‘charlas’ (informal chats with community members), Latin dance classes, school or farm visits, etc. The classes cost \$8 or \$10 each, and the revenue is divided between the Center and the community members who lead the classes. In addition, SCLC also offers extended experiences with local families through both home stays and community based tourism, where visitors take part in a range of community activities. These run from one day to one week, and cost between \$15 and \$25 per day. SCLC also offers half (\$15) or full day (\$20) community

service projects, done together with community members. Finally, SCLC offers environmental education lectures and field trips around Sarapiquí with biologists (\$75 each).

- **How are YouaAnd Your Employees Involved in Travelers' Philanthropy?**

Both Holbrook Travel and Selva Verde Lodge have made financial contributions throughout the history of the Center. We have donated the use of the building and property. For many years, Holbrook Travel gave a monthly contribution of \$500; currently, Holbrook is contributing about \$3000 per year. In addition, Selva Verde has contributed roughly \$2000 in cash per year to the Center as well as paying for various services needed by the Center. The Lodge employees are not directly involved in raising funds for the Center.



Barman at Selva Verde Lodge, Costa Rica.
Credit: Holbrook Travel

- **What Have Been Staff Reactions?**

The Holbrook Travel staff, especially those who work with teachers on educational programs, are very enthusiastic about the Center and see it as a point of pride. They recognize that the Center allows Holbrook's tour participants to really connect with a rural Costa Rican community, adding an important element to a group's experience. The Selva Verde staff is less visibly engaged in the Center although a number of members have learned English at the Center and this enabled them to get better jobs at the Lodge.

- **Have You Provided Staff Training to Support Your Philanthropic Work?**

Holbrook staff involved with the teachers and students who participate in tours are trained so they know about the trip destination, region, and site, including about the Center and what it offers. There is no real "training" for Selva Verde Lodge staff to teach them how to present the Center, nor is there any engagement program to bring them closer to SCLC's programs.

- **How are Funds Actually Raised?**

There are four ways in which funds are raised to support the Center and its programs and projects:

- Tourism—Revenue from the sales of Rural Community Tourism activities. This is the biggest sources of funding, generating at least 75% of the income for the Center and the host communities.
- Donations – Visitors and friends donate amounts in addition to the cost of their tour. Most of these funds are earmarked for specific projects, especially the

scholarship program for local school children. These funds go directly to the student, with SCLC retaining a small administrative fee.

- Fees- Students pay modest fees for their English classes.
- Grants – the Center has received small grants.

- **How Do You Solicit Donations?**

There are soft appeals for donations made to groups and individuals that visit the Center. There are no solicitations at the Lodge, only information about the Center.

- **Are Donations Tax Deductible?**

Yes, donations from U.S. residents are tax deductible because the Center is a nonprofit organization registered in the U.S.

- **Do Travelers Visit the Project Sites?**

Only a small percentage of the guests at Selva Verde Lodge visit the Center. All Rural Community Tourism activities take place in the target communities with whom we are working.

- **Do You Offer Opportunities for Voluntourism?**

The Center offers voluntourism as part of the activities that generate income for the Center. Paying volunteers can participate in a reforestation effort and community service projects.



- **What Type of Educational Materials Do You Give to Travelers?**

Educational materials are shared with Lodge guests in two ways: Each room has a Guest Information Sheet which provides information about the Center and the Lodge has a “Green Corner” where there is information about the Center and invites guests to visit.

- **Does Your Website and/or Company Advertising Promote Philanthropy?**

To a degree. The Selva Verde Lodge website has information about the Center. <http://www.selvaverde.com/lang/en/sustainability.php>

- **What is the Structure to Ensure Accountability?**

The Board of Directors of the Association in Costa Rica monitors the budget of the Center.

- **How Much Has Been Raised?**

Most funds are raised through Rural Community Tourism activities. On average, this represents between \$40,000 to \$60,000 per year.

- **Has Your Philanthropic Program Helped, Hurt or Had No Impact on Your Business?**

I believe the Center's existence and its work have benefited the Lodge because groups enjoy the opportunity to engage in community service, service learning, and rural community tourism. This opportunity is a strong attraction for some groups, especially the educational groups with whom Holbrook works. Additionally, I believe that the Center's English language and other educational programs have helped to funnel more qualified staff to the Selva Verde Lodge. Also, the Center's social outreach reflects well upon Selva Verde, despite the sometimes strained relations between the two organizations. These strains have existed over the years in part because of different views among the founders and key players in Selva Verde Lodge and different management approaches of the for-profit Lodge and non-profit Center. Despite efforts to overcome these differences, the staff at the Lodge and the Center have never received a clear understanding of what they can expect from each other because of the lack of a shared vision. Ironically, the Lodge's CST (Certificate for Sustainable Tourism) rating in the area of social responsibility is considered lacking by the tourism authorities despite the relationship and history that exists between the Selva Verde and the Center. According to authorities, the good work of the Center should not be considered as an outreach effort of the Lodge because it is a separate entity.

For more information contact:

Andrea Holbrook: Andrea@Holbrooktravel.com

Websites: www.selvaverde.com, www.holbrooktravel.com, www.learningcentercostarica.org

Hotel Punta Islita

By Maria J. Barquero
Responsible Tourism Outreach Manager, Grupo Islita

Hotel Punta Islita (www.hotelpuntaislita.com) is located in Guanacaste, Costa Rica, in a secluded coastal region of the Nicoya Peninsula. Opened in 1994, Hotel Punta Islita is an independent resort and wholly Costa Rican owned. It has been carefully developed, as its website states, “in full synergy with its neighboring communities.” More than 85% of the hotel’s staff of about 130 employees is local. Hotel Punta Islita hosts approximately 8000 visitors a year.

Hotel Punta Islita caters to an upscale market with a green conscience. It has both a 5 star rating for quality and service and 4-green leaf rating with Costa Rica’s Certification for Sustainable Tourism (CST) program. Hotel Punta Islita offers a unique and successful blend of personal luxury and cultural authenticity set in a framework of responsible tourism. In recent years the resort has won a number of international awards for both its quality of service and for its responsible tourism practices. These include Virgin Holidays Responsible Tourism Awards for Best for Local Communities (2010); *Conde Nast Travelers’* Reader’s Choice Award (2010), Top 10 Resorts in Central/South America (2009, 2008), and Gold List (2008, 2009, 2010); and *Travel + Leisure Magazine’s* Best 500 Hotels in the World (2009).

- **When and Why Did You Begin Your Company’s Travelers’ Philanthropy Programs?**

Since its 1994 inauguration, Hotel Punta Islita has bound its success to the establishment of symbiotic ties with the surrounding villages and townships. It is located in an economically depressed area formerly over-exploited by unsustainable cattle ranching and wood extraction. The surrounding tropical dry forest had been stripped, access to education was limited, and professional opportunities were nonexistent.

By providing employment opportunities, job training, educational initiatives, and an innovative community art program in partnership with the local communities, the area has gradually transformed an economically depressed slash-and-burn agricultural area into a thriving collective of tourism professionals and micro entrepreneurs. Almost 50¢ of every dollar spent at Hotel Punta Islita stays in the local communities as salaries, contributions, taxes, social benefits, and local purchases. And over the past seven years, the hotel has been able to strengthen guest involvement in its travelers’ philanthropy projects due to growing consumer interest in directly benefiting the communities where they vacation.



Village Art Gallery, Punta Islita, Costa Rica.
Credit: Hotel Punta Islita

- **How Do You Select Projects?**

Projects are selected based on an ongoing interaction between the hotel staff and local community leaders, government officials, and relevant NGO’s. Today, the Islita Sustainability

Committee brings key staff from Hotel Punta Islita, local community leaders, and business owners together for monthly meetings to outline future goals and working strategies.

Development of some initiatives, including the village-based day care center and the Islita Art Museum, has been led by the hotel's management and staff. Other projects have been community driven. The initial projects identified and addressed pressing infrastructure and social service needs. Through the years, the sponsored projects have been increasingly focused on art, complementary education, and raising environmental awareness. Examples of these include the creation of a regional recycling center, the Islita Open Air Contemporary Art Museum, and Casa Museo studio and gallery.



Children's art class, Punta Islita, Costa Rica.
Credit: Hotel Punta Islita

- **How are Your Company and Employees Involved?**

The company makes financial contributions to support local projects and is also actively involved in leveraging other resources. The hotel is in a unique position to help mobilize government resources, other company contributions, NGO assistance, and private citizen contributions. Hotel staff and management have been actively participating in community meetings. Some also participate in volunteer work projects, including beach clean-up and sea-turtle protection.

- **What Have Been Staff Reactions?**

Very positive. The experience helps to deepen a sense of belonging and purpose.

- **Have You Provided Staff Training to Support the Philanthropic Work?**

Yes, the General Manager and Human Resources Manager are actively involved. Hotel Punta Islita also has brought a leading Costa Rican artist to be the Islita Art Museum Curator and community artist leader.

- **How are Funds Actually Raised?**

Traditionally, hotel resources have helped to leverage government programs and in-kind contributions from like-minded companies. Foundations like AVINA and Fundecooperacion have also provided significant funding. A group of foreign vacation home owners have also started a U.S.-based foundation to help raise additional funding.

- **How Do You Solicit Donations?**

Through the years, we have attempted several strategies, ranging from adding \$3 to the final bill to requesting voluntary donations during check-out. Roughly 50% of guests visit the Islita Art Museum and about 30% report purchasing local art (a direct community benefit).

- **Are Donations Tax Deductible?**

Only through the private vacation home owners foundation. We have set up a presence on CREST's Travelers' Philanthropy donations portal, but have yet to actively request donations. We are open to developing strategies to do so.

- **Do You Offer Opportunities for Voluntourism?**

Yes, we offer short term experiences such as beach clean-up activities and sea-turtle protection in Camaronal. But we are developing a more formal voluntourism program to be launched in 2011.



- **What Type of Educational Materials Do You Give to Travelers?**

Guests are given a Responsible Tourism brochure outlining responsible travel and Hotel Punta Islita's social and environmental policies and practices. We are re-designing it to incorporate giving options. Our community initiatives are described on a second-level page within the website (http://www.hotelpuntaislita.com/what_we_do/the-iniciative). We also feature relevant content in our monthly newsletter which goes to about 10,000 people and via social media.

- **How are Funds Distributed?**

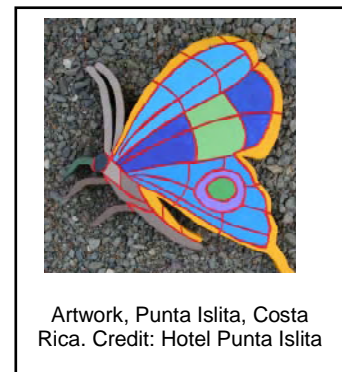
They are distributed on a project by project basis, depending on the needs of each project. In terms of ensuring accountability, Hotel Punta Islita's Finance Department actively manages the accounts and provides financial reports.

- **How Much Has Been Raised?**

About \$100,000 since 2003.

- **Has Your Philanthropic Program Helped, Hurt or Had No Impact on Your Business?**

It has definitely helped Hotel Punta Islita. The healthy relation with the community and recovering ecosystem has made this a more attractive and unique destination. We are also encouraged to find that the hotel's "green" personality attracts a better clientele, people who are more interested in culture and in protecting natural resources.



For more information contact:

Maria Barquero: outreach@grupoislita.com

Website: www.hotelpuntaislita.com

Rock Resorts and Vail Resorts

By Julie Klein
Director of Environmental Affairs, Vail Resorts

Vail Resorts Management Company (www.vailresorts.com), headquartered in Broomfield, Colorado is the operator of six world class ski resorts: Vail, Beaver Creek, Breckenridge and Keystone in Colorado and Heavenly and Northstar Resorts in Lake Tahoe, California/Nevada.. The company owns and operates a hospitality and lodging division with the flagship luxury brand RockResorts (www.rockresorts.com) with locations throughout the U.S. and in the Caribbean. Vail Resorts also owns and operates many other hotels and condominium properties including, Grand Teton Lodge Company in Wyoming, Colorado Mountain Express ground transportation, Specialty Sports Ventures-retail, and seven award-winning golf courses. Vail Resorts employs approximately 3,000 staff year-round and nearly 18,000 during peak winter operations. Resort operations range from budget to luxury operations, all the way to four diamond hotels.



The Pines Lodge, Colorado. Credit: Vail Resorts

- **When and Why Did You Begin Your Company's Travelers' Philanthropy Program?**

Corporate stewardship has always been fundamental for both Vail Resorts as the parent company for ski resorts, retail operations, and Rock Resorts, which was founded in 1956 by legendary conservationist, Laurance Rockefeller. In recent years, we have formalized this commitment to stewardship through two pivotal programs we created to tie into travelers' philanthropy. These are our voluntary guest-giving program with the National Forest Foundation and a similar program that extends outside of our Colorado and California properties into all RockResorts locations and our guest volunteer vacation program called "Give & Getaway".

- **How Do You Select Projects?**

Our core company operations, ski resorts, operate within U.S. National Forests. The health of these forests, the companion watersheds, and the surrounding ecosystems are critically important to the sustainability of our business as well as the viability and health of adjacent communities. Accordingly, we work to identify opportunities to contribute to the long term health of our National Forests and to engage our guests and employees in supporting this commitment through donations or hands-on volunteer activities. Our donation



Hayman restoration project, Colorado.
Credit: Vail Resorts

program channels funds to the National Forest Foundation (<http://www.nationalforests.org>), the non-profit partner of the U.S. Forest Service, which distributes monies to local conservation organizations. These same local conservation organizations are also our partners in our *Give & Getaway* volunteer vacation program.

- **How are Your Employees and Your Company Involved in Travelers' Philanthropy?**

Our employees are actively involved in both the National Forest Foundation (NFF) voluntary guest donation program as well as the *Give & Getaway* volunteer vacation program. For the *Give & Getaway* volunteer vacation program, many employees from our resort locations work side-by-side with our guests on trail, stream and sand dune restoration, tree planting, and other conservation projects.



Hayman restoration project, Colorado.
Credit: Vail Resorts

- **What Have Been Staff Reactions?**

All our employees live in the communities where they work and they are often outdoor recreational enthusiasts with a passion for protecting the iconic natural settings surrounding our resorts. They are proud to promote and participate in programs we have created that help to protect the natural environment.

- **Have You Provided Staff Training to Support the Philanthropic Work?**

In keeping with all programs we launch throughout our company, our travelers' philanthropy programs also include training procedures to ensure employees understand and can clearly communicate our guest engagement programs. Within our lodging division, employees are trained to explain the program during guest check-in and can provide guests with information about where funds from the donation program are directed.

- **How are Funds Actually Raised from Travelers?**

We offer guests at our mountain resorts the opportunity to participate in this special fundraising effort through the National Forest Foundation (NFF) by contributing \$1 on season passes, \$1 on online lift ticket transactions and \$1 per room night at our Colorado-based lodging properties. The NFF matches each dollar donated with \$.50, and the total \$1.50 is directed to on-the-ground conservation efforts. To date, more than \$1.6 million has been directed to more than 50 projects within the National Forests surrounding our Colorado resorts and in the vicinity of Heavenly in South Lake Tahoe, California and Nevada. A similar voluntary donation program is in place at all of our RockResorts with funds directed to organizations such as Grand Teton

National Park Foundation; Hyde State Park in Santa Fe, New Mexico; and Surfrider Foundation in Miami, FL, and Reef Check in the Dominican Republic.

- **How Do You Solicit Donations?**

Donations are requested in several locations including email confirmations for lodging reservations and in guest room materials, online sales websites for lift tickets and season passes, and through other guest marketing communications. For more information on our NFF donation program see <http://www.vailresorts.com/CORP/info/protecting-our-forests.aspx>.

The company does not include its own corporate donations through this program, but actively supports the National Forest Foundation and Forest Service conservation efforts through such projects as the Hayman Fire Restoration Project (sites.google.com/site/treasuredlandscapes/) and directly through ongoing forest service maintenance plans and volunteer efforts throughout the year.

- **Do Travelers Visit the Project Sites?**

Donations are directed to projects in popular recreational areas that are enjoyed by both visitors and local residents. So our guests are vacationing in the project areas.



Hayman restoration project. Credit: Vail Resorts

- **Do You Offer Opportunities for Voluntourism?**

The *Give and Getaway* program gives volunteers the opportunity to work on projects in recreational areas around our resorts. Volunteer vacations vary slightly by location, but packages include a ½ to full-day volunteer project packaged with discounted lodging and other resort amenities. These are offered at all of our lodging properties including our Caribbean RockResorts. More details on Give & Getaway can be found at www.giveandgetaway.com.

- **Are Your Philanthropic Programs Advertised on Your Website?**

Yes, visitors to our site can find out about the donation and volunteer programs as one of our many offerings and commitments to sustainability.

- **How are Funds Distributed?**

The NFF donation program is managed within our company's automated accounting systems to ensure that donations are captured during booking and payment. Our companies have highly controlled accounting mechanisms that constantly track the donations. Funds collected from the various donation sources are aggregated and distributed twice per year to the National

Forest Foundation. Non-profit organizations then apply to NFF for funding for local projects through the program.

- **How Much Has Been Raised?**

More than \$1.6 million.

- **Has Your Philanthropic Program Helped, Hurt or Had No Impact on Your Business?**

Through our NFF donation, *Give & Getaway* programs and partnerships with local community groups and non-profit organizations we have made significant positive impacts in our resort locations and neighboring communities. The programs are designed to be long -lasting with visible improvements to area recreational trails, campgrounds, and in improving forest health. As noted above, our staff enjoys and is proud of these travelers' philanthropy programs in terms of our guests and corporate image.

For more information contact:

Julie Klein: JKlein@vailresorts.com

Websites: www.vailresorts.com, www.rockresorts.com,

<http://www.vailresorts.com/CORP/info/protecting-our-forests.aspx>

Villages of Loreto Bay and Loreto Bay Foundation

By Mark J. Spalding
President, The Ocean Foundation

The Loreto Bay Foundation (www.loretobayfoundation.org) was created and designed to receive 1% of gross sales of real estate in the Villages of Loreto Bay (VLB). VLB was a sustainable resort development on the Baja California Peninsula coast of the Sea of Cortez in Loreto, Mexico built by Canadian investors and heavily marketed to U.S. and Canadian vacationers and retirees. Between November 2004 and December 2008, the Foundation received nearly \$1.2 million dollars from real estate sales, as well as additional gifts from individual donors and from the re-sale of some homes (which are also required to contribute 1% of the gross sales price). This revenue stream for the Foundation is set forth in the Master Development Agreement for the project, and in the trust deeds for the homes and condos.

These funds were used for projects in and around Loreto, with a focus on giving to community projects and to the Loreto Bay National Park. Grantees were primarily selected by Foundation staff based on extensive research to find worthy projects. The grants ranged from \$200 to \$200,000.

Here are some highlights of how the Loreto Bay Foundation has dispersed funds entrusted to it in the fields of health, education, the environment, and sustainable development in and around Loreto.

- **Health**

To address emergency medical needs, the Foundation contributed to building a new hospital for Loreto as well as an ambulance shade shelter. The Foundation also provided funds for the fire department to obtain “jaws of life” equipment and training (to literally cut open wrecked cars to extricate accident victims), as well as for maintenance of its ambulance equipment. The “jaws of life”

has already been instrumental in several life-saving rescues on the highway near Loreto. In 2006, when Hurricane John ravaged the area, the Foundation paid for fuel for all the volunteer helicopters that evacuated people and brought in relief supplies to those isolated in the mountains. Our efforts to improve the health of the people of Loreto also included support for a residential drug and alcohol rehabilitation facility.

To help address a growing crisis of street dogs and cats (and their waste), the Foundation contributed to the cost of building a clinic, called Animalandia. It has periodically contributed to the costs of purchasing supplies for spaying and neutering surgeries which are performed by volunteer veterinary surgeons from the U.S.



- **Education and Social Welfare**

For the children of Loreto, the Foundation has helped support purchase and distribution of back-to-school supplies and the development and implementation of a certified environmental curriculum. It provided support for the *internado* boarding schools that provide children from rural areas with a place to stay while attending school in the town of Loreto. Foundation grants also helped to outfit and support Loreto's first regionally competitive soccer team, Los Frailes. Each year at Christmas, the Foundation underwrites a project that provides all families in Loreto who are below the poverty line with a full meal, new blankets, and individually wrapped presents for the children of the household. Finally, the Foundation supported the Casa Hogar home for abused or endangered children.



Internado bus, Loreto, Mexico.
Credit: Mark Spalding

- **Environment**

In addition to community work, the Foundation has also sought to protect the natural resources upon which the beauty and quality of life in Loreto is based. It made a grant for creation, printing and distribution of a comic book to educate about overfishing and sharks. It also provided support so that the Loreto Bay National Marine Park could add two extra patrol and enforcement staff. Further, the Foundation has funded research regarding sea turtles in the national park and has provided support for the annual meeting of the sea turtle “guardians” of Baja California, as well as for their mobile education vehicle.

To create a great sense of stewardship within the community, the Foundation gave a gift to the U.S. based conservation organization, RARE to undertake a Pride Campaign in Loreto. The effort is producing wonderful results. Selecting the Chocolate Clam as its symbol, the national park and the campaign leader have infused the park staff with pride in their jobs, and the community of Loreto with pride of place. The community has celebrated hosting the park through special events and an entry in the annual parade for the commemoration of the Mexican Revolution. The symbol of the campaign is seen on bumper stickers, caps, and t-shirts all around town. In short, the park staff feels welcome and part of the community in a way they never have before.



RARE Pride Campaign, Loreto, Mexico.
Credit: Cynthia Brown

- **Sustainable Development**

The Foundation's most ambitious project has been to make sure that vision of the Villages of Loreto Bay, as a sustainable community, was not an isolated one. The goal is to ensure that all of Baja California Sur (BCS) does not end up looking like Los Cabos with its overabundance of high-rise, mass tourism resort facilities that are disconnected from the culture and natural resources of the Baja California peninsula. The Foundation financed sustainable development training for two staff of the BCS' Direccion de Planeacion Urbana y Ecologia (Department of Urban Planning and Ecology) and then worked with them and outside experts to develop a set of Coastal Sustainable Development Standards. These standards are drawn from the vision of the Villages of Loreto Bay as well as from best practices from around the globe. The Foundation staff then analyzed the Mexican federal and state law to identify gaps and is now working with the state to pass a planning law that will fill these gaps. In the meantime, while we await a change in the law, the Direccion de Planeacion Urbana y Ecologia asked the Foundation to create a guide for real estate developers, in order to educate them about the Coastal Sustainable Development Standards. This has been completed and 500 copies were printed and provided for distribution to those seeking development permits.

EPILOGUE: During the 2008-9 economic recession, Citibank took over the Villages of Loreto Bay project and effectively stopped the development. Regrettably, the revenues to the Foundation came to a halt and thus so did support for the community and the park.

Citibank has the development up for sale. If a new buyer is found and accepts the terms of the Master Development agreement already in place, the Loreto Bay Foundation and its revenue stream will be protected. However, if the new buyer convinces the Mexican government to change the Master Development Agreement, the changes could include dropping the Foundation revenue concept.

For more information contact:

Mark J. Spalding: mspalding@oceanfdn.org

Websites: www.oceanfdn.org, www.loretobayfoundation.org

Calabash Tours & Calabash Trust

By Paul Miedema

Director, Calabash Tours and Founder, Calabash Trust

Calabash Tours (www.calabashtours.co.za) is a micro enterprise that was established in 1997, and is based in Port Elizabeth, South Africa. The company is a commercial entity with a strong social agenda. The core business is informative social history tours that include daylong visits to disadvantaged townships in Port Elizabeth. The purpose of the tours is to offer tourists insight into some of the developmental and social issues affecting urban Africans. We showcase some of the challenges of the Apartheid past, and the triumphs of our new Democracy. The areas we visit are home to close to half a million people, of whom approximately 35% are unemployed, and 20% HIV positive.

The tours are run from a Responsible Tourism perspective, creating economic opportunities for poor communities while addressing the potential negative impacts of tourism within poor communities. The tour products have been accredited by the certification program, Fair Trade in Tourism South Africa. Calabash handled approximately 4000 tourists in 2009, and the primary source of visitors comes through large Inbound operators. Calabash Tours also runs voluntourism programs, with minimum placement duration of 1 month. The areas of focus for Voluntourism are education, and work with people afflicted with HIV/AIDS. Calabash Tours had approximately 75 volunteers in 2009. Lastly, Calabash Tours has several clients with whom we run 'Charity Challenge' type visits, where infrastructure – such as sports facilities -- is developed in under-resourced township schools. We facilitated two such events in 2009.



- **Vision**

When the company was started in 1997, we had two purposes. First we wanted to provide visitors with a balanced, well-researched insight into an urban city undergoing a transformation to democracy with the demise of Apartheid. Calabash Tours wanted to ensure tourists saw more than the wonderful scenery and wildlife that South Africa offers, but also understood the value of our human heritage and history. Townships have been perceived as dangerous and inaccessible, and yet they are home to the majority of urban Africans. Omitting Urban Black History from the tourist itinerary appeared to us to be a perpetuation of the Apartheid past which we felt our company could help to correct. Secondly, we recognized that if



we brought tourism to these communities we could bring economic opportunity, create business linkages, and help augment the income of poor households.

At this stage, we had no idea what travelers' philanthropy was, that it was possible, or even that the concept existed.

- **The Shift Towards Travelers' Philanthropy**

As we took visitors into the township areas on our tours, a force was unleashed which we had never anticipated. More and more tourists asked about supporting the projects we visited, such as schools, craft initiatives, and health facilities. It dawned on us this was an opportunity to direct resources towards these projects. In 1999, a recent immigrant from Scotland, Marion Gate, took a couple of tours with us and then approached us about setting up a legal entity for fundraising to support township projects. This was how Calabash Trust was started. In 2000, it was registered as a not –for-profit entity, and was granted legal status. Calabash Trust is a separate legal entity from the tour company, with its own board of trustees. So we embarked on the travelers' philanthropy path, at the request of our clients!

I don't think any of us involved in the beginning had any idea what we were doing, where it would lead, and that we would eventually identify our work as part of the travelers' philanthropy movement.

- **The Evolution**

Initially, all we did was tell our tour participants about the Trust, so any pens, pencils, money, goods, etc they wanted to contribute could be managed, and accounted for. We soon determined that if we were giving projects money, we needed to be sure they could account for it. Sometimes they lacked capacity to do so. Soon we were delivering small, informal workshops on book keeping, or minute keeping, and general administration. Donations were slow in the beginning, and my co-founder Marion was also involving friends and family in Scotland to generate small donations.



Home visit on township tour, South Africa.
Credit: Calabash Tours

- **Some Early Challenges**

- How were we going to prevent a dependency situation being created in the projects we were supporting?
- How were we going to channel small amounts of money from around the world into our South African bank account, without it being eaten by international bank charges?
- How were we going to monitor the progress of the projects?
- How would we identify projects?

As time went on, we started to engage in sustainability debates, developmental debates. We started to recognize that simply giving money and goods was not sustainable. We lost board members, we gained board members, and we kept increasing donations slowly.

In all honesty, we made many mistakes, had great successes, debated, remained passionate, and slowly started to learn about travelers' philanthropy, Responsible Tourism, and best practice models. What we realized, with time, is that many of our challenges were common to other people trying to do the same thing. We were on the cutting edge, and not alone. This was a relief!

- **Progression**

With time, from humble beginnings, we were able to employ staff. We started with an administrator to write emails of thanks, to write updates, and to keep our small pool of donors informed. Then we added a field worker to monitor and engage with our projects. The funding for these jobs came from one of our clients, Saga Holidays, which has an extensive Charitable Foundation.

As we grew, we realized we had to limit our scope, become more developmental and less charity driven, while monitoring and evaluating our impact. Today Calabash Trust has 6 full time staff, and a clear focus on improving schools in the townships of Port Elizabeth and surrounding areas. We support 8 schools, and have 6 Program areas: School Support and Advancement, Pre-School Support, Nutrition, Skills Development, Micro-Enterprise Development, and Internal Learning and Growth. Each of these programs has a range of projects, but all of them work through schools to reach pupils, teachers, and parents.



Dance performance on township tour, South Africa.
Credit: Calabash Tours

- **Some New Challenges**

As we grew our scope of work as Calabash Trust, we came to recognize that sustainable, innovative projects required higher capital input. Travelers' philanthropy is not a predictable or sustainable source of revenue. (But which development aid is?) Funds come from many small donors, many of whom have no understanding of development. One of the Trust's key challenges has been to stay needs-focused, rather than donor-driven. We still struggle with this, but are getting better about sticking to our operational plans, and not shifting our activities based on the wishes of donors. Our need for capital to support our more ambitious projects led us to court donors within the NGO sector. Today, the Trust is funded by a mix of travelers' philanthropy and traditional donors. But travelers' philanthropy – visitor contributions -- remains very much at the heart of our vision.

Another challenge has been reconciling the commercial purposes of Calabash Tours and the developmental mission of Calabash Trust. The two are symbiotic, intertwined, but separate, with separate agendas. Making that relationship work has not always been easy. But through a

strong ethical understanding, a strong Trust board of trustees, much debating and deliberating, the two remain in a healthy, mutually beneficial 'marriage.'

- **Some Solutions**

Today, we have a Calabash Trust UK, through which money is channeled to Calabash Trust SA. We have found organizations like SA Partners in the USA, who are able to assist with getting money to us, cost-effectively. This also allows donations from U.S. residents to be tax deductible. We have found the UK based Travel Pledge NGO a very effective way of creating income for targeted causes.

We have a Tours/Trust committee that meets regularly to unify the work of our two entities. The developmental imperative and the commercial imperative of each are respected, with both entities seeking common ground and mutual synergy.

Our guides are well briefed on the Trust projects, and gently feed this information into their tour commentary. Trust brochures are always on our busses. Promoting the Trust and its project is done with great subtlety and caution. And yet it generates income.

In addition, the Trust understands that acknowledged donors become long term friends, so we ensure that we honor the commitment of the givers.

- **Voluntourism**

Three years ago, it seemed a logical step to move our focus from 'treasure' of donors, to include 'talent and time'. We launched a self-funding, responsible volunteer program, which has been of great benefit to our projects. We found a partner in the UK, called People and Places, that shared our vision of responsible tourism, and travelers' philanthropy.

One of the great benefits of incorporating Voluntourism into our offerings is that this kind of traveler really understands the needs of the community having spent a month there. We find that the volunteers take their inspiration and understanding back to their own communities and share it with others. The combination has resulted in an effective skills transfer from volunteers to the project participants and subsequent donations of treasure for projects.

- **What is the Structure to Ensure Accountability?**

Critical Success Factors are as follows:

- We have always worked in an honest, transparent way. We believe this has been important to our relationships with communities, projects, Calabash Tours, Calabash Trust and donors.
- We have a strong board of trustees at Calabash Trust.
- Calabash Tours and Trust have a shared vision.
- We sought effective and meaningful partners, and placed trust in people abroad, like Calabash Trust UK.
- We developed a reflective culture, looking at what worked, and what did not. Dogma has no place here!

- We honor the desire of our donors, both big and small, to help serve the poor communities. We never anticipated the willingness from those far from us, to continue to champion our cause of social and economic justice.
- We understand that ordinary people can, and do, have a valuable contribution to make to development.

- **How are Funds Distributed? / How Much Has Been Raised?**

The breakdown of our travelers' philanthropy for a two year period is as follows:

Table 1: Travelers' Philanthropy Contributions, Calabash Tours (in U.S. \$)

Type	2008/2009	2009/2010
Individual contributions	\$115,000	\$86,000
Travel Company Donations	\$25,000	\$23,000
2 x soccer fields, 1x netball court in schools. (Charity challenge)	\$8,000	\$25,000
Second hand shipments of school furniture	5 x 20 ft containers value approx \$35,000	9 x 20 ft containers value approx \$65,000

We have not yet worked out a good way to measure the value of the time given by our volunteers. The project contribution which is costed into our volunteer programs is also not included in these figures. This figure is in the region of \$60,000, but is included in volunteer package costs.

- **Has Your Travelers' Philanthropy Program Helped, Hurt or Had No Impact on Your Business?**

This journey started with a small tour company with a vision. Briefly, the benefits have been as follows:

Calabash Tours has received considerable recognition from township residents as a result of the work of Calabash Trust. This has enhanced our clients experience in the townships, where they are valued, and welcomed. The positive results from travelers' philanthropy help offset the negative impacts tourism can have in communities. Community residents value tourism, and see a benefit in having visitors come to the area, even though their privacy is invaded. The additional income channeled through Calabash Trust, has allowed Calabash Tours to 'punch above its weight' within the tourism community. Calabash Tours has been able to leverage positive marketing from these initiatives. Calabash Tours is seen as being true to its values and philosophy of serving the poor. We have a tangible, measurable track record. Calabash Tours has truly made an impact in poverty alleviation and social development in the townships of Port Elizabeth.

- **Conclusion**

While we 'accidentally' became part of the travelers' philanthropy movement, this would never have happened had we not operated from a strong Responsible Tourism ethic from the

beginning. It has not been an easy road, and at times has consumed vast amounts of time which could have been devoted to further growing Calabash Tours. We believe our story of travelers' philanthropy is inspiring because it shows what a micro enterprise can do, and demonstrates the goodwill and shared humanity displayed by our visitors and clients. Sustainability of our travelers' philanthropy program remains a challenge, but this is no different from other forms of development, where sustainability challenges have existed and been debated for many years.

For more information contact:

Paul Miedema: paul@calabashtours.co.za

Website: www.calabashtours.co.za

New York Restoration Project's New Leaf Restaurant & Bar

By Nik Charov
Deputy Development Officer, NYRP and
Lauren Loeb
Public Relations Manager, NYRP

New York Restoration Project (NYRP) is a nonprofit whose mission is to restore, revitalize, and develop under-resourced parks, vacant lots and community gardens throughout New York City's five boroughs, so that no New Yorker suffers from a lack of healthy and natural spaces. By simultaneously delivering enriching and free educational and community programs at these spaces, NYRP instills in children and families a respect for nature and a commitment to New York City's long-term environmental sustainability. Since 1995, NYRP has carried out the dream of our founder, singer and actress Bette Midler, to create a cleaner, greener New York City.

NYRP (www.nyrp.org) has achieved dramatic results by investing in the greening and beautification of underserved communities throughout the city. Under Bette's leadership, NYRP has planted hundreds of thousands of trees; restored and helped maintain six New York City parks; launched MillionTreesNYC, the most ambitious urban forestry campaign in the United States; and removed more than 2,000 tons of garbage from parks and public spaces. In 1999 NYRP saved 114 community gardens from commercial development and established the New York Garden Trust to ensure that these precious spaces remain in the public's hands in perpetuity. NYRP is also responsible for transforming an illegal dumping ground along the Harlem River, into the five-acre Swindler Cove Park.



NYRP/MillionTreesNYC, New York City.
Credit: NYRP

Early in our history we decided to open a restaurant. Through our work restoring parkland, we'd uncovered a mismanaged, under-visited, and overgrown park concession cafeteria in Fort Tryon Park in northern Manhattan, just down the hill from the famous Cloisters Museum. Having succeeded in our restoration of parks and gardens, we felt we could pull off the same feat with a restaurant. NYRP won the bid to operate what we call the New Leaf Restaurant in the fall of 2000. For a year, we did the intensive and difficult renovations required, with generous public and private sector support.

We knew we were taking a risk. Ten restaurants open every week in New York City. Five of them fail within the first year of opening; four more fail within five years; only one in ten survives. However, a decade later, our New Leaf is still alive, and thriving. We now serve more than 50,000 diners per year, in a city known for fine dining. The New Leaf's rustic setting, far removed from major thoroughfares, was at first deemed a liability – it has instead been a boon. Most important, New Leaf profits have increased 8% per year for the past three years: net proceeds are being returned to NYRP to further our efforts to improve the environment of

northern Manhattan. Our diners, our guests, are giving back to the local neighborhood around their destination. The idea of traveler's philanthropy has taken hold at NYRP.

- **When and Why Did You Begin Your Travelers' Philanthropy Program?**

The New Leaf Restaurant & Bar is a for-profit enterprise and wholly-owned subsidiary of the nonprofit NYRP. The restaurant's cottage-like ambiance and lush surroundings provide a serene setting to enjoy a modern American menu created by Executive Chef Scott Campbell. The 50,000 diners a year who travel to northern Manhattan to eat at the New Leaf are engaged in travelers' philanthropy, whether they know it or not. Since achieving profitability in 2008, the net profits from New Leaf meals and drinks have gone back to parent company NYRP, which uses them to pay the salaries of our environmental restoration staff and purchase plant materials to install in Fort Tryon, Highbridge, and Swindler Cove Parks. The diners are tourists to Fort Tryon and northern Manhattan, and by eating at the New Leaf, they help to support the restoration and conservation of the local environment. It's not Costa Rica; it is Washington Heights!



By employing local residents, the New Leaf also provides economic support to the surrounding community of Washington Heights. In the past three years, the New Leaf Restaurant & Bar has:

- received an annual Michelin Guide Recommendation;
- increased its Zagat ratings for food quality (+1) and service (+3)
- returned significant revenue back to NYRP to support park maintenance, plantings, and beautification.

- **How Did You Select Projects?**

We go where we are needed most: underserved neighborhoods lacking access to clean and safe open space. NYRP has been working in northern Manhattan parks since 1995, cleaning up garbage, uncovering paths, removing invasive weeds, and replanting native flowers, shrubs, and trees as an operational partner of the New York City Parks & Recreation Department.

- **How are Your Employees and Your Company Involved in the Philanthropy?**



The New Leaf Restaurant & Bar has a staff of 40 servers, kitchen and bar personnel, and managers. New staff members are taught the precepts of NYRP's mission and history. New Leaf's employees find it especially enjoyable to be able to claim a nonprofit's action in their own

for-profit service. General Manager John Burbank and Executive Chef Scott Campbell, with more than 40 years' combined experience, have created a destination restaurant in Washington Heights. Both of them promote the New Leaf's support of the neighborhood's parks and the menu's connection to local food sources (including herbs picked in NYRP's 55 community gardens).

- **How are Funds Actually Raised from The Travelers?**

Through the sale of fine, seasonal, and delicious American cuisine in a warm and rustic setting that seats 75 inside and 80 on the patio. The restaurant can also be rented for weddings and other catered events.

- **How do You Solicit Donations?**

Diners at the New Leaf are informed of the restaurant's affiliation with NYRP through on-site signage and NYRP promotional materials.

- **Are Donations Tax Deductible?**

Dining at the New Leaf is not tax deductible because the guest is receiving a service and the restaurant is a for-profit enterprise. However, guests can make tax deductible gifts to NYRP.

- **Do Travelers Visit the Project Sites?**

Diners are often told by the New Leaf's servers about NYRP's history and cleanup efforts in surrounding parks. Guests are invited to tour the sites in future visits.

- **Do You Offer Opportunities for Voluntourism?**

Diners who sign up for the New Leaf's mailing list are added to NYRP's email list as well, which frequently includes information on how to register for volunteer tree planting and park cleanup projects around New York City.

- **What Type of Educational Materials Do You Give to Travelers?**

NYRP newsletters and flyers are displayed at the check-in table at the New Leaf.

- **Is Your Travelers' Philanthropy Promoted on Your Website or in Your Advertising?**

The New Leaf is described at http://www.nyrp.org/About/New_Leaf_Restaurant_Bar and has its own website at www.newleafrestaurant.com.



NYRP/MillionTreesNYC, New York City.
Credit: NYRP

- **How are Funds Distributed? What is the Structure to Ensure Accountability?**

Net profits from the New Leaf are accounted for in NYRP's consolidated financial statements. NYRP's operations, including the New Leaf, undergo an annual financial audit that ensures accountability.

- **How Much Has Been Raised?**

Over the past three years, more than \$150,000 has distributed to help support NYRP's restoration and conservation efforts of urban parkland in northern Manhattan.

- **Has Your Philanthropic Program Helped, Hurt or Had No Impact on Your Business?**

NYRP helps publicize the New Leaf's menu and events to its 12,000 individual donors. The New Leaf Restaurant, in turn, continues to tell the story of NYRP's environmental crusades in New York City. The New Leaf also receives accounting, marketing, and management support from the parent NYRP organization. Both companies have thrived from the relationship.



NYRP's Environmental Education Program, NYC. Credit: NYRP

For more information contact:

Nik Charov: ncharov@nyrp.org

Lauren Loeb: lloeb@nyrp.org

Website: www.nyrp.org

Country Walkers

By Sonya Bradley

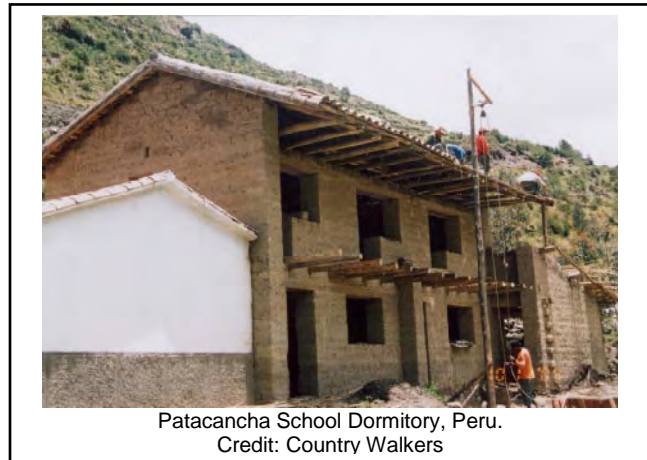
Tour Manager and Chair, Responsible Tourism Program, Country Walkers

Country Walkers, based in Waterbury, Vermont (www.countrywalkers.com) was established in 1979 and is the world's premier, small-group active tour provider. Offering well-crafted itineraries for Guided, Self-Guided and Private & Custom adventures, each trip unfolds with exceptional accommodations, regional cuisine, a dedication to best practices in tourism, and talented, local guides. We have 20 employees, not including over 100 guides in over 60 destinations worldwide.

- **When and Why Did You Begin Your Company's Travelers' Philanthropy Program?**

While on a Country Walkers tour in Peru in 2003, guests visited with the people of Patacancha, a small village 13,000 feet in the Andes. Moved by the tremendous spirit of the villagers, the travelers, asked their local guide, "Is there anything we can do to thank the villagers for their generous welcome?" Their guide, a Peruvian native, turned to the Patacancha school principal, with this question: The principal suggested that a dormitory adjacent to the school would be beneficial to the local children, providing a place for the students to stay during the school week.

Guests from this Peru tour, as well as others returning from Country Walkers trips from around the world, have been excited about their 'off the beaten path adventure' and they are interested in supporting the communities they visited. And so began the idea of our "giving back" projects. This case study will focus primarily on the Patacancha Project as it was our first. Our other projects around the world are being set up to replicate the Patacancha project.



Patacancha School Dormitory, Peru.
Credit: Country Walkers

- **How Do You Select Projects?**

We work directly with the communities to which we travel. Our guides, who are local to the regions in which they guide, help us create the bridge between us, our travelers, and the local communities. Projects are selected by the communities -- for example in Nepal, our good farming project was suggested by the "mothers group" in the small village of Daharampani. Today we support three "giving back" projects in Peru, Nepal, and Egypt. Additionally, we have partnered with organizations and initiatives throughout other regions where we operate to support their efforts. From Rainforest Alliance projects (www.rainforest-alliance.org) to the Yellowstone to Yukon Conservation Initiative (www.Y2Y.net), Country Walkers has committed financial and staff resources. We rely on our relationships with host communities, guides,

vendors, our guests, and our established criteria to ensure we select partner organizations who share our beliefs. In turn, this ensures our supporters' commitment to designated organizations and projects.

- **How are Your Employees and Your Company Involved in the Philanthropy?**

Our giving back programs and responsible tourism efforts are integral components of our corporate culture, reinforcing the importance of the immersive tour experiences we offer our guests. Guest donations to on-tour projects and to global initiatives assure us that they have had a truly authentic experience with a deep understanding of the region and communities in which they traveled.



Students from Patacancha, Peru.
Credit: Country Walkers

- **Have You Provided Staff Training to Support the Philanthropic Work?**

Yes, we accomplish this by providing ongoing updates to our in-house staff and worldwide guides; this can occur during staff meetings, scheduled presentations by our company's Responsible Tourism Committee, email updates, and staff tour reviews. Every tour itinerary includes a Responsible Tourism component with ongoing tour discussions and presentations reviewing and reinforcing these efforts. Guest comments and feedback citing these initiatives are shared with all staff. Post-tour guide reports are shared as well. Our larger guide family is educated and involved with initiatives and projects via our guide handbooks, guide webinars, and in guide trainings.

- **How are Funds Actually Raised from Travelers?**

We have been sending travelers to the Center for Responsible Travel's Travelers' Philanthropy giving portal at <http://www.travelersphilanthropy.org/community-projects/patacancha-dormitory-project.shtml> after they have returned home in a follow up email. Also our guides give a gentle ask at the appropriate time during our trips. Usually this occurs after the guide has taken the travelers to one of the project sites. (For more information, see guide Juan Carlos Yañez, "My Role as a Guide," in Chapter 6).

- **How are Funds Distributed? What is the Structure to Ensure Accountability?**

For the Patacancha Project, every year we (our guide Juan Carlos, the school principal Mauro Crisostomo Masias Condori, and myself) conduct a planning session to assess and determine future Patacancha community projects. Costs are estimated per project. Upon project completion, receipts are sent to the home office for reconciliation.

No project money is disbursed unless its expenditure was previously identified and agreed upon. The Patacancha Project is structured with a Peruvian bank account that includes three authorized persons or signatories. Additionally, all new projects for the school including the

recently constructed trout farm now require signed letters of commitment from all teachers at the school. Our other projects worldwide are set up in this same manner.

- **How Much Has Been Raised?**

To date we have raised over \$16,000 for the Patacancha Project from contributions of travelers and Country Walkers. Additionally we have set up a CW Travelers' Fund that is worldwide and adds a donation amount to each traveler's trip that gives back to each of the destinations they visit. This is the first year we have started this Fund and so do not have the accounting for how much has been raised, but we anticipate around \$30,000 for 2011.



Patacancha student, Peru.
Credit: Country Walkers

- **Has your Philanthropic Program Helped, Hurt or Had No Impact on Your Business?**

We believe our ongoing support of worldwide community projects and initiatives is integral to the Country Walkers mission. This commitment is part of our corporate culture and Country Walkers employees and guides proudly support this priority. Our philanthropic commitment and the specific inclusion of responsible travel practices into our tour itineraries is also recognized by our guests—we know this by tracking the financial contributions made by our guests and by their direct feedback and responses to their on-tour experiences.

For more information contact:

Sonya Bradley: sonya@countrywalkers.com

Website: www.countrywalkers.com

Educational Travel and Travelers' Philanthropy: The Gambia

Marina Novelli, Ph.D.

**Principal Lecturer, Tourism Development & Management
University of Brighton, UK**

Heritage and cultural tourism, ecotourism, agrotourism, and other types of education-oriented tourism seem to be of increasing importance both to the tourist and to the tourism industry. Although no reliable statistics on educational travel are yet available, there is evidence that this growing type of tourism can benefit communities through responsible tourism practices, enrich the learning experience of travelers/students, and go the extra mile by "giving back to the visited locale" in a sustainable manner.

Beginning in 2007, the winter-sun destination of The Gambia has been the setting of a responsible tourism "laboratory" for a group of final year students engaging in a new field-based module, called Destination Niche Tourism.



Group work, The Gambia. Credit: Marina Novelli

The driving force behind the module was my determination to help students understand the importance of responsible tourism by both putting theory into practice and requiring that the students confront some of the myths and inequalities occurring in a developing countries.

Students studying travel and tourism in the UK are generally taught about the sector's impacts, development and management issues, but they receive limited applied experience. At best, students encounter inconsistent on-the-ground opportunities and many students graduate without any exposure at all. Many of them have never visited a developing country, although they might end up working in jobs that involve traveling to or knowledge of these places.

In order to better prepare future travel professionals, in my role as a university lecturer, I facilitated collaborations between the School of Service Management (SSM) of the University of Brighton in the UK, where I teach, and the Association of Small Scale Enterprises in Tourism (ASSET) of The Gambia and Gamspirit, a local responsible tourism business operator. We developed a field-based training to benefit both students studying in the UK and participants from The Gambia. Gambian students would be sponsored by SSM and its students through fundraising and a travelers' philanthropy initiative.

Tourism is an integral part of The Gambian economy and although it is claimed to be a key driver in the socio-economic development of the country, it is also the cause of considerable negative impacts such as social inequalities. Current attempts to make the industry more sustainable through the diversification of its tourism product and the facilitation of field-specific training and capacity building initiatives aim to reduce the negative impacts.

Today, SSM's educational travel experience has become an example of how UK-based

institutions and students can engage in travelers' philanthropy. The money raised through the SSM program sponsors Gambian students participation in a one-week field-based capacity building training on niche tourism product development. In order to support each Gambian participant, a sum of approximately £100 per participant is required, which is raised by the SSM staff and UK students participating in the program. Based on merit, a total of 10 Gambian participants are sponsored each year, with the selection process managed by the chair and a committee of ASSET.

The one week training course is designed to facilitate cross-cultural collaboration, knowledge exchange and peers' capacity building. In-class activities, led by both UK based and local experts take place at the Safari Garden Hotel in Fajara and at the Sandele Eco-retreat in Kartong – chosen for their responsible tourism commitment and practices. In addition, this innovative learning experience is enriched by local field visits, during which the Gambian students play a key role in guiding and advising the visiting students on practical Gambian tourism issues.

The niche tourism training covers product development and management approaches, business planning, cross-cultural collaboration and team building. In the final stage of the module, teams of students present their innovative niche tourism business ideas that offer sustainable alternatives to the existing Gambian tourism portfolio. Past ideas have included: wellbeing holidays at Kartong eco-retreat, field-specific volunteering holidays, cross-cultural encounters and community-based agrotourism, camping adventures upcountry, river cruising, eco-wedding events, and sport charity challenges.



Drumming lessons, The Gambia.
Credit: Marina Novelli

It has been gratifying to see how the SSM collaboration with ASSET and Gamspirit has resulted in a valuable opportunity for both international and Gambian students to enhance their vocational learning. By offering an innovative travelers' philanthropy experience through which students based in the UK help to raise scholarship funds as part of their course, this initiative enables Gambian students to take part in training that would otherwise not be available to them.

Although many university programs offer opportunities for their students to travel abroad and incorporate features such as home stays, participation in local projects, and language training to expose young people to different cultures, this training is unique because it is delivered for the benefit of both international and Gambian participants. Furthermore, it is distinguished by the fact that they contribute to raising funds to sponsor their Gambian counterparts and the Gambian students are responsible for providing local leadership and guidance during the field visits. Following this experience, a number of participants decided to study development-related matters at postgraduate level. Several of the participants indicate this experience is a selling point when they are job hunting and view it as one of the most significant learning experiences they had. Gambian participants express great appreciation for the opportunity to visit, learn and share their knowledge about their own country and, many speak of this training as a "life changing experience."

This training module has proven to be an innovative and meaningful way to conduct educational travel in general and study trips in particular. We believe that it can serve as a template for

study-abroad courses in a range of subjects and in many diverse destinations. Too many international courses are, in my opinion, mainly site-seeing trips. It is time for travel professionals and educational institutions to proactively establish collaborative partnerships in the destination to create far more sustainable educational experiences by engaging people on both side of the host-visitors interface.

• How to Organize a Similar Educational Experience?

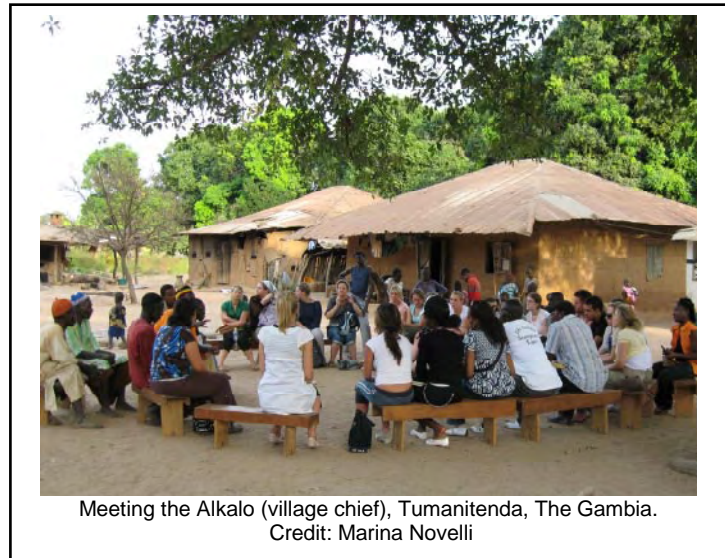
The following ten points are quite general and will have to be adapted to specific context in which you are operating:

1. Choose a destination based on the needs of your discipline and budget availability.
2. Map how the proposed learning outcomes of your training are linked to the locally available activities and most importantly local priorities and needs.
3. Choose one or more local partners (this may include private sector' operators and/or educational institutions with comparable programs to those at your university). Make sure they operate according to a responsible tourism code of practice.
4. Negotiate the way your university and participating students are going to fundraise and sponsor participants from the host country. Will their costs be covered by your university or will your students be required to fundraise in order to sponsor their colleagues from the destination?
5. Consult with local partners on the nature of the training and evaluation you are going to give to participants to make sure it reflects a practical need of the destination.
6. Establish selection criteria for local participants - in collaboration with a local institution - and make sure that the number of selected participants reflect budget available. Invite your own students to take part in the initiative.
7. Introduce students from your institution to responsible travel practice, especially if their regular course of study has not been on these topics. Prepare a 'code of conduct' and related disciplinary regulations to be distributed and accepted by students prior to departure. Include clear guidelines about health and safety, field trips, personal relationships, and financial expectations,
8. Upon arrival at the destination, establish ground rules with all participants – both international and in- country, to manage expectations and ensure participants' commitment and engagement in all activities.
9. Upon completion of the training, provide a 'Certificate of Achievement' from your institution to all attendees. This is especially important for local participants.
10. Follow up with all participants, requesting feedback to improve future trips.

For more information contact:

Marina Novelli: M.Novelli@brighton.ac.uk

Website: <http://www.brighton.ac.uk/ssm/>



Global Sojourns and the GS Giving Circle

By Priscilla Macy
President, Global Sojourns

Global Sojourns (www.globalsojourns.com) is a boutique adventure travel company that specializes in customized mid-range and luxury level trips to Africa. Global Sojourns was founded in 1997 in Zimbabwe and is currently based in Arlington, VA. The owner, Priscilla Macy, is full-time and there are a few part-time/contract staff.

- **When and Why Did You Begin a Travelers' Philanthropy Program?**

I lived in Africa and worked in international development before starting the company. Although I now live in the United States, I wanted to continue to “give back” to Africa and, at the same time, to assist clients who wanted to provide meaningful support in Africa. My prior work in development and women's' issues, together with my extensive research on effective use of small grants, influenced my decision to focus on supporting girls and education via community-based organizations.



Visiting children who GSGC supports with school fees, Dambwa, Zambia.
Credit: Global Sojourns.

When I was looking for a model for the Global Sojourns' philanthropic program, I met Marc Ross Manashil at CREST's first Travelers' Philanthropy Conference in 2004 at Stanford University. Marc was working for the Clarence Foundation and promoting international philanthropy through the concept of Giving Circles. The model appealed to me because it provides a great platform for donor involvement and learning. The Global Sojourns' Giving Circle officially began in 2007 (www.gsgivingcircle.org).

- **How do You Select Projects?**

Working with the Clarence Foundation and using our own contacts, we looked for small, well-run community-based organizations that focus on assisting children, especially girls, and supporting education.

We developed a list of criteria (e.g. overall budget, leadership) which we used to identify potential partners (grantees). Originally, the Global Sojourns' Giving Circle (GSGC)

members met by conference call to discuss and decide which projects to support. We now have a vetting committee selected from among our donors that proposes a list of organizations



Visit with micro-loan recipients, Zambia.
Credit: Global Sojourns.

and projects to support and then Giving Circle members vote to approve or deny these recommendations.

We work directly with the people who run the community-based organizations (CBOs) and NGOs that receive grants. In one location we have a contact on the ground who helps monitor the project we fund and recommends additional projects.

Our Philosophy of Giving:

- Support sustainable, grassroots projects where limited amounts of money will make a significant difference.
- Rigorously research projects before committing funds.
- Monitoring the projects we invest in through regular communications and occasional visits.
- Give input, but more importantly, listen to what those running the projects express as to how our support can be best utilized.
- Educate ourselves about the projects, the issues, the cultures /communities, and about best practices in international philanthropy.
- Connect with the projects and the people running them.



Meeting caretakers of orphaned children, Livingstone, Zambia. Credit: Global Sojourns

Projects We Support:

- Funding of education expenses for extremely poor and often orphaned children.
- Income generating projects that help the caretakers of these children.
- Educational and empowerment workshops for girls.

• How are Funds Raised?

Information about the GSGC is primarily through word of mouth via current members as well as newsletters, the Global Sojourns' website, and the GSGC blog. Gatherings hosted by members have been effective for increasing awareness and raising money for GSGC. We realize that we need to improve GSGC communications with Global Sojourn's clients about the mission and work of the Circle and how they can get involved.



GSGC members attend community meeting to learn about the local issues, Dambwa, Zambia. Credit: Global Sojourns.

• Are Donations Tax Deductible?

Yes. All donations are tax deductible. We started out working through a U.S based fiscal sponsor which receives the funds and provides the required tax deduction verification letters to donors. The fee for this service and all overhead expenses are paid by Global

Sojourns so 100% of the donors' funds go directly to the projects. We are currently forming our own 501(c)3.

- **Do Travelers Visit Project Sites?**

So far, only clients who go on our designated GSGC trips visit the projects. We are now making it possible for clients on customized itineraries can visit the projects in ways that mutually benefit the guests and the communities in a meaningful manner.

- **Do You Offer Opportunities for Voluntourism?**

Our GSGC trips are designed for travelers/participants to learn about the issues facing our local partners and the work that they are doing to address those issues. Our time on these trips is spent connecting, listening, and learning rather than “doing”. Global Sojourns is not averse to providing hands-on assistance but only in circumstances where there is a specific request from our partners and we happen to have skills that meet our partner's need.

Our visits to the projects last only 1-3 days so participants barely have enough time to learn about the local issues and the work of our partners. We believe that the most effective use of the GSGC trips is to initiate relationships between donors and partners so that participants can return home and share their experiences with others. The real goal is raising funds for our partners.

On GSGC trips, we participate in activities such as taking the orphans and vulnerable children (who we support with school fees and supplies) on outings to, for instance, Victoria Falls. We have found this to be an effective way to deepen our connections and to explore and learn about local areas together.

- **What Type of Educational Materials Do You Give to Travelers?**

Information about the Giving Circles and the projects we support is on our website. In addition, we host conference calls before the trips and provide an electronic hand-out to each traveler going on a GSGC trip. The hand-out focuses on topics such as the importance of learning, being aware of cultural differences and traveling with an open mind, different theories of international development, how issues are generally more complicated than they look from the perspective of a short visit, and what travelers can do to capture information during the journey and share what they have learned when they return home.



GSGC members give 'comfort dolls' to staff at a pediatric hospital, Livingstone, Zambia.
Credit: Global Sojourns.

Clients traveling on customized itineraries receive a hand-out about “Traveling Responsibly” in which we remind them that they can make a positive difference by following some simple guidelines. One section focuses on philanthropy.

We host educational conference calls for GSGC members on a quarterly basis. Experts present information on topics such as girls and education and micro-lending. We also offer conference calls when a GSGC group has returned from visiting the projects so that they can update other members and share their experiences. Occasionally we offer a call where members can discuss a book that is related to international philanthropy and/or our specific focus.

- **How are Funds Distributed?**

Each year Global Sojourns accepts proposals from organizations in southern Africa. The vetting committee reviews the proposals and makes recommendations to the GSGC members regarding allocation of the funds. Then the full Giving Circle membership votes on these recommendations. We only fund organizations in Africa that have legal status as non-profits. We provide copies of the proposals and legal documents to our fiscal sponsor. The sponsor prepares the paperwork and wires the funds to the organization’s account.



- **What is the Structure to Ensure Accountability?**

We visit the projects two or three times per year and review the organizations’ books. An accountant who runs a highly respected accounting firm in Africa volunteers his time to assist two of the organizations with their books. This gives us an additional level of accountability. The organizations also prepare financial and narrative reports.

- **How Much Has Been Raised?**

We have distributed \$15,000 - \$25,000 in total per year for the past four years.

- **Has Your Philanthropic Program Helped, Hurt, or Had No Impact on Your Business?**

There is no direct correlation between our philanthropy work and an increase in clients but that was not the purpose. The purpose is to provide those with a heart for Africa with a way to “give back” in a manner that is direct, responsible, and impactful and to provide the donors with a connection with and increased understanding of the people and communities that they are assisting.

For more information contact:

Priscilla Macy: Macy@globalsojourns.com

Websites: www.globalsojourns.com; www.gsgivingcircle.org

GoPhilanthropic

By Lydia Dean
President and Founder, GoPhilanthropic

GoPhilanthropic (www.gophilanthropic.com) was established in 2007 as an innovative socially-conscious travel organization committed to helping individuals and small groups create meaningful life experiences through travel philanthropy.

Our mission at GoPhilanthropic is to connect donors to grassroots organizations around the world that are providing effective, creative, and sustainable solutions to global issues. We then facilitate personal donor connections and direct engagement with these organizations through travel--often the most powerful element in the engagement process.

GoPhilanthropic has a portfolio of 10 to 15 partner small grassroots organizations around the world and has facilitated over \$110,000 in support for these organizations in the past 3 years.

From our base in Rochester, New York, we connect donors with our partner non-profits in Vietnam, Cambodia, Thailand, Laos, India, Costa Rica, Guatemala, Uganda, and Kenya.

Our trips are designed to:

- Support and provide exposure for various community-based organizations making a difference around the world.
- Link individuals and small groups with these organizations through travel.
- Encourage direct engagement in solutions to global issues.
- Encourage active and engaged philanthropy through travel.



Our tours have engaged 200 travelers so far through the following services:

Custom-built Philanthropic Journeys for individuals, families and small groups. These trips can be designed to the travelers' interests.

Donor Travel for non-profit organizations, funding networks, and giving circles that want to connect their donors and members to the projects they fund.

Travel for Educational Groups and Alumni Associations that want to combine in-depth cultural and historical trips with philanthropy.

Philanthropic activities for Corporations wanting to integrate philanthropy into their international incentive and corporate travel programs.

- **When and Why Did You Begin Your Company's Travelers' Philanthropy Program?**

GoPhilanthropic was founded in response to the need for a company designed to offer in-depth engagement or experiential component to philanthropy. We handle purely Travel + Philanthropy. We did our research and discovered no one was doing this. We found a lot of great CSR (corporate social responsibility) and we found several travel companies making donations to good causes or offering travelers tours that incorporate meaningful elements. We did not find another travel company with philanthropy at its core and main mission.

Our strategy in starting GoPhilanthropic was to build a company where philanthropy received 100% of the attention instead of being an arm or a separate product or CSR (which we have also incorporated). We focus on connecting clients to organizations – so they can see for themselves the value and impact of the work in context. The travelers' philanthropy is based on informed



Students looking at new books, Hoi An, Vietnam.
Credit: GoPhilanthropic

decisions and the education received during the trip. We see ourselves as “door openers” for both a traveler and a non-profit, facilitating a direct connection between the two.

We are a small yet dedicated team of individuals who are more passionate than ever about what the future can bring if we collectively take steps, small and large, to help our global neighbors reach their potential. Initial years were spent researching and meeting with inspirational humanitarian and grassroots organizations. We now link people with these smaller grassroots, community-based projects through travel--a vehicle that connects people on a truly human level and eliminates the barriers that can often superficially separate us. The result offers travelers meaningful and authentic exchanges with local communities, while providing a valuable source of support for projects worldwide.

- **How Do You Select Projects?**

We conduct extensive research in each geographic area in which we work, personally connecting and meeting with many grassroots organizations and humanitarians. GoPhilanthropic has developed an internal vetting process to identify community-based projects – often times grassroots yet with strong sustainability components. Our goal is to support an NGO's sustainability plan and ensure that the partner does not become dependent on our funding. If an organization does not have a well-rounded plan, we do not pursue a partnership. A list of the organizations we support can be found at: <http://www.gophilanthropic.com/philanthropictravel/projects.php>

Our services have expanded from creating trips for individuals and small groups to include “donor travel” for small to large non-profit organizations such as Habitat for Humanity. These organizations have deep reach within communities and connections to small non-profits working under their umbrellas. When we facilitate travel for existing donors, GoPhilanthropic does not select projects. Rather we are linking donors to the projects they already support to help increase their engagement in philanthropy.

- **What Have Been Staff Reactions?**

Because philanthropy is at the core of everything we do, all employees are devoted to our mission.

- **Have You Provided Staff Training to Support the Philanthropic Work?**

As a young company that is inventing a new product we are always training and learning as we go.



M-Lisada Orphanage for street children, Kampala, Uganda. Slogan is Music to the Rescue.
Credit: GoPhilanthropic

- **How are Funds Raised?**

Our clients learn about the projects during the planning stages of their trip. Before traveling they decide how they would like to support the project. We offer advice and provide options to our travelers, based wish lists made by each non-profit organization.

Examples include: funds for a water well, library, micro-finance loan, classroom, scholarships, repairs to buildings, or things as simple as school supplies. During the trip, our clients participate in an on-site meeting with a representative of the local partner organization to see where their funds went. Most importantly, this meeting gives our clients the opportunity to see and experience the value of their contribution.

Some of our groups fundraise before traveling. In those cases, we ensure that the donations collected go toward true program needs, as opposed to what the traveler thinks the program should get. Ten percent of our clients want to meet, see, and learn about the program before giving their financial contribution. We support this approach too because our focus is on education and bringing people to the door of these great organizations. When there is a desire to support, we then make sure it is channeled appropriately.

- **How Do You Solicit Donations?**

Anyone who travels with us has already self-identified as being interested in philanthropy. A portion of the company's net profits will automatically be given to our partners. In addition, each traveler has the option to support the organizations and projects they visit, but it is never required. We believe education is the first step and that our clients may decide later to give. We offer a variety of avenues for our clients to support our partner organizations.

In the latter part of 2010, we launched a Grassroots Giving Campaign whereby donors could support our partner non-profits by funding items small and large. Donors are given the opportunity to travel to the locations or simply fund them.

In Southeast Asia, GoPhilanthropic donors raised funds for five village water wells in Siem Reap, a community water system in Phnom Penh, scholarships for university students, assistance for women's empowerment in Thailand, and several mobile libraries in Vietnam with these organizations.

- **Are Donations Tax Deductible?**

We are awaiting our U.S. 501c3 status in order to offer tax deductions to our donors. Most of our partner non-profits are registered charities so donors have been able to claim an income tax deduction against their U.S. income. However, we would like to be able to offer this deductibility to our smaller non-profit partners who do not have this option themselves.



- **Do Your Clients Visit the Project Sites?**

Our GoPhilanthropic travelers always visit the project sites yet we have quite a network and following of clients who simply fund our portfolio of programs. We are proud to offer trips as the engagement portion of philanthropy, yet not everyone is in a position to travel.

- **Do You Offer Opportunities for Voluntourism?**

If a client wants to volunteer we refer him or her to companies in that business. Our focus is on educating the traveler – having them learn about, engage with, and support these programs--not work at them. We believe that financial investment does far more good than volunteering, in most cases.

- **What Type of Educational Materials do You Give to Travelers?**

Our unique service requires that we thoroughly educate our clients about the mission and focus of programs before, during, and after their visit.

- **Is Travelers' Philanthropy Promoted on Your Website and/or in Your Advertising?**

Yes, of course. It is at the core of what we do.

- **How are Funds Distributed? What is the Structure to Ensure Accountability?**

We utilize a different system than most travel companies. Our clients contribute directly to our non-profit partners instead of to the company for subsequent disbursement to the beneficiaries. The company and the clients receive follow-up reports from the partner organizations which also keep us informed about program growth and direction of future initiatives. Donated funds are almost always converted into something tangible such as a well to supply drinking water, a library, or a classroom. Accountability is built into our approach because clients see how their

donation is being used when they travel to the community in person. Money paid to GoPhilanthropic is strictly for travel services/tour related fees.

- **How Much Has Been Raised?**

Philanthropic Results: 2008-2010

1 university scholarships, Cambodia.
3 sampans donated to families, Vietnam.
1 classroom built, Cambodia.
School supply drop, India.
Relief effort, India.
Relief effort, Myanmar (Burma).
Health program at AVANI, India.
School scholarships, Mexico.
16 water wells installed, 20 wells repaired, Cambodia.
12 mobile libraries donated to schools, Vietnam.
1 vocational sewing project launch, Cambodia.
4 computers donated for a computer lab, Cambodia.
Outfitted PIO Orphanage with supplies, Laos.
Running costs and internet capability for TARA boys home, India.
Development of formalized women's empowerment program, India.
Water and free school program, Cambodia.
Pump out station in Lagoon, St. Marteen.
1 classroom running costs funded for 2 years, Cambodia.
Fundraising event for Global Village Foundation, Vietnam.



Barstow High School students with a water well they donated, Siem Reap, Cambodia. Credit: GoPhilanthropic

AVANI School infrastructure development: 2 water tanks, solar power, grain bins, storage units, 10 bikes, Tuk-tuk auto-rickshaw, India.
Grassroots Giving Campaign, Holiday season 2010, funds directed to the wish list specified.
Corporate donations, directed as specified.

Total \$110,050

In addition to the funds travelers donate in association with their trips, many return home wanting to do more to support the communities and programs they visited through fundraisers and other types of continued connections. The end of the trip is often the beginning of a relationship rather than the end of a journey.

- **Has Your Philanthropic Program Helped, Hurt or Had No Impact on Your Business?**

It is our business....

Case Study 1: Corporations Weaving Philanthropy into Incentive Awards Trips

Recently a large global IT software management company decided to partner with GoPhilanthropic in order to incorporate philanthropy into its incentive awards trips offered to its top producing employees. The trips are a way to congratulate those who have produced exceptional results for the company and are set in magnificent locations around the world. This year the Senior Management of this globally-conscious company decided that in giving back to its employees, it should also give back to the communities that host their incentive events.

In February 2010 the company's top regional sales representatives convened in Siem Reap, Cambodia for a 3 day tour of the Temples of Angkor Wat. During their stay, GoPhilanthropic facilitated a \$10,000 donation to its partner, local grassroots organization Journeys within Our Community (JWOC). JWOC works to provide safe drinking water and free school programs for the villages surrounding the famous temples.



Visit to Journeys Within Our Community (JWOC), Siem Reap, Cambodia. Credit: GoPhilanthropic.

The IT Company's efforts did not simply involve writing a check to this inspirational organization. They wanted to engage "real-time" in order to better understand the challenges facing the region and to see firsthand how their donation would be used for solutions. GoPhilanthropic arranged activities that brought together employees of the company and village community members including a dance presentation by program members, an in-depth overview of JWOC's work, an onsite visit to a village where the clean water program is operational, and participation in a school class. After seeing firsthand the impact of JWOC's programs, the donor company decided to do more. Employees are being given the opportunity to make donations to support the long-term sustainability of JWOC.

In 2010, Go Philanthropic facilitated \$30,000 in additional donations through this corporation in Mexico, St. Marteen, and Borneo.

Case Study 2: Group Journey to India: Gandhi Legacy and Philanthropy Tour

GoPhilanthropic partnered with several humanitarians who host clients and offer a truly in-depth experience into a region of India's culture, history and development needs.

A small group of seven travelers journeyed to India for a rare opportunity to understand Gandhian Legacy and Philosophy firsthand. They were guided in part by M.K Gandhi's grandsons, Dr. Arun and Tushar Gandhi. The group toured significant Gandhian sites in Delhi and Mumbai and visited social and development projects focused on women's empowerment and business development, and educational programs that assist marginalized children in slum areas. The group then traveled south to Kolhapur to meet with an organization working on eradicating child labor.

After meeting with project leaders and gaining an understanding of the issues, group members made individual contributions to the organizations they felt were creating positive and sustainable change. Contributions went towards materials and tools requested by the leaders of the projects. Several group members made long-term commitments to engage further in particular programs.

The trip signifies GoPhilanthropic's emphasis on helping individuals become educated, informed, and engaged philanthropists and exemplifies the company's role as a facilitator in connecting globally-conscious individuals and grassroots projects.



Women who are fighting for their rights
listening to Arun Gandhi, Kolhapur, India.
Credit GoPhilanthropic

For more information contact:

Lydia Dean: Go Philanthropic <gophilanthropic@yahoo.com>

Website: www.gophilanthropic.com

Elevate Destinations

By Dominique Callimanopulos
Founder and President and
Kristie Giannetto
Program Director, Elevate Destinations

Elevate Destinations (www.elevatedestinations.com) was founded in 2005 to be a philanthropic and sustainable travel company specializing in providing “responsible travel” opportunities to private and institutional clients. We donate 5% of the net costs of all our trips to NGOs in host countries, supporting the protection of natural resources and community development in the destinations we serve. Every trip we organize has a “beneficiary” organization.

We organize educational visits to community projects as well as short-term service and volunteer opportunities for many of our clients. We are the leading specialists in creating donor travel programs for non-profit organizations to highlight their successful overseas work. Whenever possible, we select sustainable accommodations for our travelers: green options that do not compromise on aesthetics, amenities, service, or security.



Global Fund for Women trip, India.
Credit: Lori Barra, Elevate Destinations.

Elevate Destinations is headquartered in Cambridge, Massachusetts (USA) and serves the following destinations worldwide:

- **Africa:** Mali, Morocco, Kenya, Tanzania, Uganda, Rwanda, Ethiopia, South Africa, Botswana, Zambia
- **Asia and the Pacific:** China, Bhutan, India, Mongolia, Thailand, Vietnam, Cambodia, Australia, New Zealand, Tahiti
- **Central and South America:** Argentina, Brazil, Chile, Ecuador, Peru, Belize, Guatemala, Honduras, Panama, Cuba



Global Fund for Women trip, India.
Credit: Lori Barra, Elevate Destinations.

Elevate Destinations currently has eight people on staff. We serve mid- to high- range and luxury clients.

- **When and Why Did You Begin Your Travelers' Philanthropy Program?**

Philanthropic travel was fundamental to our original company philosophy: we were founded in order to leverage support for urgent global issues. The company's founder, Dominique Callimanopulos, became conscious of the inequities between travelers and native communities during her travels growing up in an international family. This inspired her involvement with many non-profits and philanthropists. Dominique saw the opportunity to combine singular travel with giving back to the communities. Elevate Destinations developed from this vision.

- **How Do You Select Projects?**

We rigorously research non-profit partners to identify projects and organizations that exemplify best practices and then we partner with them either as beneficiaries or clients. The non-profit projects, grantees, and clients for whom we have organized trips include: Dian Fossey Fund, Global Fund for Women, Global Fund for Children, Global Giving, Rare Conservation, The Foundation for Tomorrow, Kickstart, Ecologic, Direct Relief International, Plan USA, School for Field Studies, Survival International, and Water Partners International. Projects and



Global Fund for Women trip, India.
Credit: Lori Barra, Elevate Destinations.

organizations can benefit from our company in one of two ways: either by being a direct beneficiary of private Elevate Destinations trips, or as clients by using our donor travel services to increase donor investment.

- **How are Your Employees and Your Company Involved in the Philanthropy Program?**

Elevate Destinations' staff assists in planning the trips and making all necessary travel arrangements for our travelers. We also research and vet prospective new partners. We interact with each of our non-profit partners to ensure that the ultimate goal of the organization is met for each and every trip.

- **What Has Been the Staff's Reaction?**

Our staff is honored to work with such wonderful non-profit partners and finds it very rewarding to be able to contribute to so many good causes.

- **Have You Provided Staff Training to Support Your Philanthropic Work?**

Yes. Philanthropic travel is an emerging space that requires a unique skill set.

- **How are Funds Actually Raised from the Travelers?**

For our donor travel programs, a donation can be either built into the cost of a trip, or the trip can motivate immediate or future philanthropic investment. Some non-profit partners opt to have travelers raise funds to go on a trip, while others rely on the connections and relationships built during project visits to generate major giving after a trip. Our experience is that the in-person connections that donors make with people and environments at their destination is invaluable and, without exception, increases their support for the project.

- **How Do You Solicit Donations?**

As mentioned above, donations are either built into the cost of the trip, or worked out afterwards directly with the NGO partner.

- **Are Donations Tax Deductible?**

Again, it depends on the trip and what the NGO partner wants.

- **Do Travelers Visit the Project Sites?**

Yes. With each donor trip, the NGO partner decides how many program days to incorporate for visits to project sites.

- **Do You Offer Opportunities for Voluntourism?**

The NGOs with whom we work decide if they want to have their donors do hands-on service when they are visiting communities.

In addition, Elevate Destinations' Urgent Service Travel engages people interested in helping after disasters in second response disaster relief, providing relief to people that have been affected by disaster, and also enlisting a lay citizen corps who might not otherwise have the courage or the access to such situations. Elevate Destinations' expertise in travel organizing and humanitarian issues allows us to engage people in crucial second response relief that requires a different type of engagement, one that supports reconstruction, rebuilding, and recovery for people working to get their lives back together. We are committed to filling this need with the human capital and funding that is necessary for long-term recovery. Elevate Destinations ensures collaborative arrangements that benefit communities and provide a safe and fulfilling journey for volunteers.



Global Fund for Women trip, India.
Credit: Lori Barra, Elevate Destinations.



Global Fund for Women trip, India.
Credit: Lori Barra, Elevate Destinations

- **What Type of Educational Materials Do You Give to Travelers?**

We work closely with the non-profit partners to develop materials on the destinations and projects to be visited and we provide those materials to each traveler before the trip begins.

- **Is Travelers' Philanthropy Promoted on Your Website and/or in Your Advertising?**

We promote travelers' philanthropy, in one form or another, in all of our communications. Most of the marketing for our donor travel program is done internally through our partners. We will occasionally blog on trips at our partners' requests. All of our non-profit clients are featured on a portal on our website.

Each of our pre-packaged itineraries has an established beneficiary organization so when a person clicks on the link to a destination they learn about the nonprofit that will receive a portion of their trip cost. In the section of our website entitled "Travel Matters" visitors can click on any of the countries we visit to find out which NGOs we support that are doing work in that country.

- **How are Funds Distributed?**

Funds are distributed by us to our NGO partners who use the money in their programs and projects.

- **What is the Structure to Ensure Accountability?**

We work with established, credible partners almost all of which are qualified charities under Internal Revenue Service code. By thoroughly vetting our NGO partners in advance, we can be confident that funds provided by our clients will be used properly.

- **How Much Has Been Raised?**

- Direct Relief International's trip to Uganda raised \$60,000 for their health clinic there, which funded motorcycle ambulances.
- Kickstart International's trip to Kenya helped to raise \$960,000.
- Water Partners International's trip to Ethiopia raised \$20,000.
- Ecologic's trip to Honduras helped to raise \$50,000.
- Raised \$800,000 for the Conservacion Patagonica land trust.

This is not a comprehensive list of the donations generated by our trips. Instead these selected figures serve as indicators for how powerful these donor travel programs are. Donor travel is fast becoming one of the most efficient ways to leverage funds for community projects worldwide.

- **Has Your Philanthropic Program Helped, Hurt or Had No Impact on Your Business?**

Travel philanthropy is our business. We are in the business of helping people to travel responsibly and to give back to each and every community that we visit.

For more information contact:

Dominique Callimanopulos: Dominique@elevatedestinations.com

Kristie Giannetto: giannettok@gmail.com

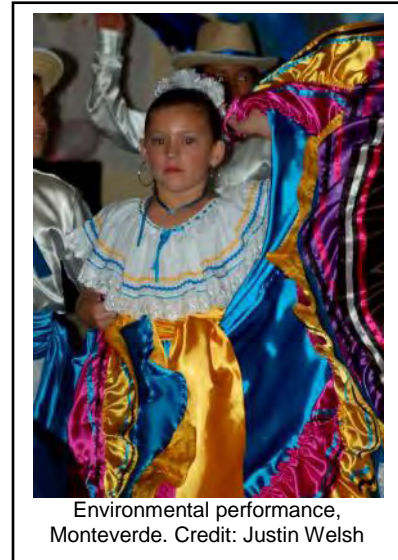
Website: www.elevatedestinations.com

Monteverde: A Destination-Level Travelers' Philanthropy Initiative

By Robert Bailes
Coordinator, Monteverde Travelers' Philanthropy Initiative

This essay is distinct from the other case studies because this program, launched in August 2010 by the Monteverde Institute and CREST, is still in development. It represents a major new innovation in the field of travelers' philanthropy, one through which tourism businesses within a destination work collectively to create a program to provide contributions to a list of projects that have been designated as priorities by the community. The closest example in this volume is IGTOA, which, as the case study explains, brings together key businesses and organizations operating in the Galapagos Islands, Ecuador.

We believe that this destination-level model can be applied in other locations that, like Monteverde, have a strong cohesive community and a recognizable tourism brand. CREST is planning to launch, together with its local partner Fundacion Corcovado, a similar program for the Osa Peninsula, Costa Rica. We believe that the carefully planned approach being used in Monteverde will help to provide a road map for others seeking to launch a destination-wide travelers' philanthropy fund.



- **Why a Destination-Wide Fund?**

A need to channel the economic wealth of tourism for the benefit of the community. Like many international tourism destinations, Monteverde's tourism sector has developed rapidly in a relatively short time period. Monteverde has a local population of only 6,000 individuals, yet it receives 240,000 visitors a year, drawn by its world renowned cloud forest reserve, a growing array of other nature-based attractions, and its dozens of mainly small-scale, locally-owned eco-lodges. Beginning in the mid-1990s, tourism surpassed dairy farming as Monteverde's most important economic activity. While many tourism businesses espouse strong social and environmental principles and most are owned by Costa Rican or long time foreign residents, only 7 have been certified under Costa Rica's CST program and few have organized travelers' philanthropy programs.



On the way to Monteverde, Costa Rica. Credit: tripadvisor

Tourism has brought some benefits to the community, but it has not necessarily delivered an equitable form of development, nor has it effectively channelled the economic wealth of tourism into local community development. A number of causal factors go toward explaining this failure, however, of most significance has been the lack of a community-level mechanism to redirect the economic resources generated through contributions from tourism businesses and travelers into community-led social, economic, and environmental development initiatives. The destination-level Travelers' Philanthropy Initiative seeks to bridge this gap by putting in place a community mechanism to channel contributions from tourism into community development.

An opportunity for corporate community investment and collaboration.

Monteverde has 133 registered businesses, the vast majority tourism related. Despite the size and influence of the sector, however, corporate community investment is underdeveloped. Very few tourism enterprises actively solicit philanthropic donations from tourists in a concerted and organized manner. For those that do, there is little transparency about the end-projects into which these donations will be invested, or indeed, how they fit into the larger economic development of the community. The destination-level Travelers' Philanthropy Initiative seeks to provide incentives for businesses to undertake community investment programs and help to manage these investments more effectively through a Travelers' Philanthropy program.



Travelers' Philanthropy Short Course, Monteverde.
Credit: CREST

A need for private sector financial resources to assist democratically prioritized public needs. As with most other tourism destinations in developing countries, Monteverde's public institutions lack the economic resources to fulfil community development needs. Central government funding, channelled through the local municipality, is inadequate to meet all of Monteverde's basic infrastructure and service requirements. A successful destination-level Travelers' Philanthropy Initiative would help to put in place a long-term mechanism to generate private sector contributions to support projects designated by the community as priorities for sustainable development.

- **Implementation of the Monteverde Travelers' Philanthropy Initiative**

Step 1. Community Consultation

The Monteverde Travelers' Philanthropy Initiative began in August 2010 when the Monteverde Institute, in partnership with CREST, held a community consultation in the form of a Travelers' Philanthropy Short Course. This was a half-day workshop designed to provide an overview of the Travelers' Philanthropy concept and to gauge community interest in establishing a destination-level programme in Monteverde.

The Short Course was attended by over thirty members of the community representing 10 local NGOs and 11 tourism businesses. Feedback from the session was overwhelmingly positive, with all participants expressing a desire to move ahead with the development of a destination-level Travelers' Philanthropy program for Monteverde. The Monteverde Institute agreed to be

the local institution overseeing the initiative, with international expertise provided by CREST. A core development team was formed and is led by a day-to-day coordinator.

Step 2. An Advisory Committee

Following the Short Course, the Monteverde Institute sought out key community leaders interested in forming a local Advisory Committee to support in the development of the initiative. In September 2010, five active community members were chosen based on their personal involvement in community affairs and the strategic importance of the local organizations they represent. Two local organizations – the private sector Monteverde Chamber of Tourism (CETAM) and the local Integrated Development Association (IDA) – were seen as particularly important players in the development of this new initiative.

With the Advisory Committee formed, a work plan was then designed and in October 2010 the committee began meeting twice monthly to provide input on key elements of the initiative. These include:

- To support and advise on creation of a 18-month action plan for development of the Travelers' Philanthropy Initiative in Monteverde;
- To advise on appropriate fundraising techniques and models that can be applied across a range of local tourism enterprises;
- To support a six-month pilot project in 2011 during which time the initiative plans to test several selected fund collection mechanisms, and to gauge their suitability in the Monteverde context
- To serve as "ambassadors" for the Monteverde Initiative through local promotion and a campaign to attract new members and businesses.



Travelers' Philanthropy Advisory Committee, Monteverde. Credit: Rob Bailes

Step 3. The Pilot Project, 2011

During the first six months of 2011 the Monteverde Initiative will initiate a small pilot project during which time participating tourism businesses will look to raise money via tourism donations for the benefit of a pre-identified community development project. The purpose of the pilot phase is to test, in a short period of time, various fund collection mechanisms and the on the ground practicality of Travelers' Philanthropy in Monteverde. The lessons learned from this pilot will be evaluated and used to inform the long-term development of the initiative. This pilot phase will include structured consultation sessions with interested tourism businesses, local NGOs, and government officials.

Step 4. The Community Project, 2011

During the pilot phase, the Monteverde Travelers' Philanthropy Initiative will channel funds raised into a pre-identified community investment project. That community project is being chosen by the Advisory Committee, based on a series of locally determined criteria. These include its visibility, the practicality of completion, and its overall benefit to the Monteverde community. Projects under discussion include the renovation of selected community centres

where many local community activities take place, including those focussed on youth and education.

Step 5. An Independent Association

Following implementation of the pilot phase, there will be a short evaluation period during which time the Monteverde Institute will head up an assessment of the pilot project, including the level of business and visitor support and the success of the various mechanisms used. Based on this evaluation, the Monteverde Institute and the Advisory Committee will produce a long-term strategic plan detailing a road-map for creating the destination level Monteverde Travelers' Philanthropy program that can, over a 5-year period, become self-funding. The strategic plan will include an assessment into the feasibility of establishing an independent, not-for-profit, democratically elected entity that would manage the Monteverde Travelers' Philanthropy Fund in the long-term.

• Challenges of a Destination-level Initiative

Developing a Travelers' Philanthropy program at the destination-level raises a series of challenges that are generally not encountered by an individual tourism business that builds its own program. These challenges include:

- How to motivate and unite a number of disparate tourism enterprises in pursuit of identified goals and objectives;
- How to select fund collection mechanisms that can work across a number of different businesses with varying business and accounting models (e.g. hotels versus tour operators);
- How to practically identify community development projects that should benefit from tourism donations, given the number of actors and institutions involved in a destination-level initiative.
- How to build an effective campaign to educate visitors about community needs and generate contributions to assist designated local projects.



Quetzal in Monteverde cloud forest, Costa Rica. Credit: Justin Welsh

• Expected Outcomes

Given the complex challenges involved in the development of Monteverde Travelers' Philanthropy Initiative, the program organizers are both realistic and cautious about what can be achieved in the 18 months designated for its development and launch. In the long-term however, the initiative seeks to affect a number of structural issues. Proposed outcomes are as follows:

- The **immediate outcome** anticipated from our project is a politically and technically viable Travelers' Philanthropy Initiative for Monteverde, based on active stakeholder participation and community consultations.

- The **long-term anticipated outcome** is a well-functioning, transparent, and widely supported mechanism to equitably channel contributions from tourism businesses and visitors into democratically selected community development projects. It is expected that this initiative will encourage tourism enterprises to think more strategically about their own social responsibilities and will generate a steady stream of resources for community-identified development needs.

For more information contact:

Robert Bailes: rabailes@hotmail.com

Website: www.Monteverde-Institute.org

Chapter 3:

Voluntourism

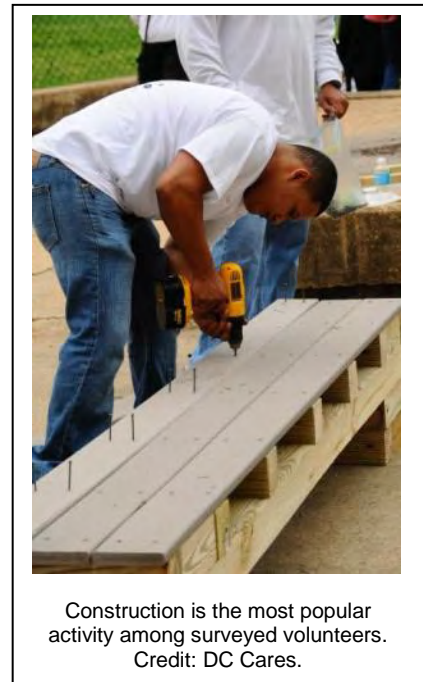
Voluntourism: An Overview

By Kristin Lamoureux, Ph.D.
Director, International Institute of Tourism Studies,
The George Washington University

- **Volunteer Tourism – Introduction**

At the crossroads of volunteering and tourism is volunteer tourism or “voluntourism”. While there is no single accepted definition of what constitutes volunteer tourism, generally it involves the inclusion of a volunteer component to a vacation experience. According to one academic, to be a voluntourist is to “volunteer in an organized way to undertake holidays that may involve aiding or alleviating the material poverty of some groups in society, the restoration of certain environments or research into aspects of society or environment.”³⁸

There is a great deal of variation in the volunteer-to-vacation ratio within a volunteer experience. Some might range from a week-long vacation with an afternoon spent volunteering at a local animal preserve while others might involve five days building a house with only a one-day leisure experience. Of course, everything in between is also possible. The amount of time spent volunteering versus participating in tourism activities varies depending on the desire of the volunteer and the needs of the receiving organization.



- **History of Volunteer Tourism**

Volunteer service and tourism share a long history. Traveling for the purpose of volunteering probably began around 1915.³⁹ Within the last 50 years, prompted by the creation of such organizations as the Peace Corps, as well as increased awareness of global social and environmental issues, tourism activities that involve a volunteer component have increased tremendously. In the UK and other parts of Europe there is a long history of the “Gap year”

³⁸ Stephen Wearing, *Volunteer Tourism: Experiences That Make a Difference*, Wallingford, Oxon: CABI Publishing, 2002, 240 pgs.

³⁹ Ibid.

when young people take a year off prior to beginning university studies to participate in a volunteer experience.

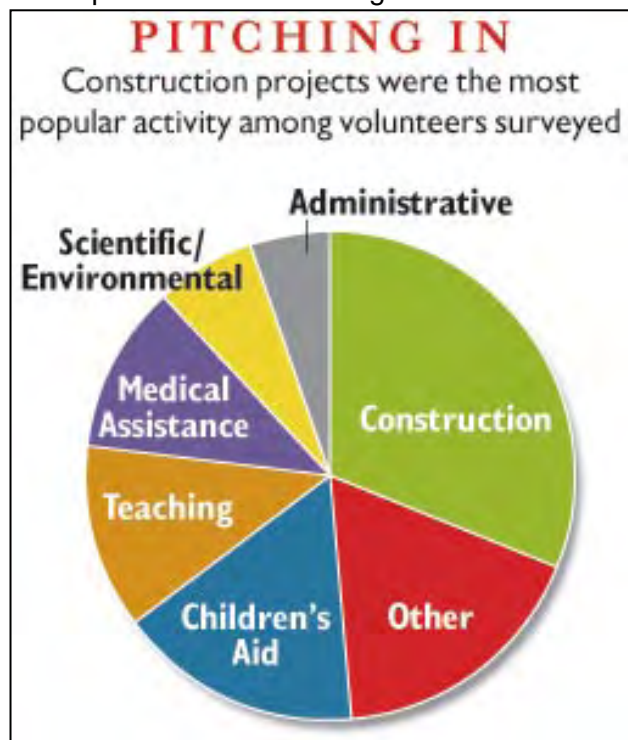
Study abroad trips and international volunteering continue to be significant activities, particularly for college students and recently graduated individuals. What is new is the short-term volunteer experience. Shortened trips that incorporate both tourism and volunteering have developed over the last 10 years in order to accommodate the growing portion of the tourism market that seeks to “give back” as part of their vacation experience. With reduced time and limited resources, tourists are seeking ways to combine these two important activities. While providing many benefits for both travelers and recipient projects, the rapid growth of short-term volunteering also raises a number of questions.

- **Growth of Volunteerism and Voluntourism**

Volunteerism, either on its own or involving travel, contributes to overall development on a global level. The United Nations has stated that “volunteerism is an important component of any strategy aimed at poverty reduction, sustainable development and social integration.”⁴⁰

Globally, the number of individuals participating in volunteerism continues to rise. In Britain, 73% of adults participated in at least one volunteer activity in 2007.⁴¹ In Australia, 4.5 million individuals reported participating in a volunteer activity in 2006.⁴²

In the United States, volunteers provide free or inexpensive labor for more than 40,000 not-for-profit organizations.⁴³ According to the U.S. Bureau of Labor Statistics, 60.8 million people volunteered for or through an organization during fiscal year 2007.⁴⁴ National and local initiatives, such as the U.S. Freedom Corps, continue to grow in popularity. Promoting volunteerism has been a major agenda item for several U.S. Presidents including Bill Clinton, George W. Bush and Barak Obama. In 2009, the U.S. Congress passed the Serve America Act, which amends the National and Community Service Act of 1990 and is expected to increase funding to Americorps and other volunteer programs within the United States.⁴⁵



⁴⁰ United Nations Economic and Social Council, *Volunteering and Social Development*, February 21, 2001, p. 1.

⁴¹ Cohesion Research, “Citizenship Survey: 2007-08 (April 2007 – March 2008), England & Wales,” Statistical Release No. 4, United Kingdom National Statistical Bureau, June 2008, <http://www.communities.gov.uk/documents/communities/pdf/863680.pdf>.

⁴² Australia Bureau of Statistics, 2007, <http://www.abs.gov.au/ausstats/>.

⁴³ Philip Kotler, *Strategic Marketing for Nonprofit Organizations*, Englewood Cliffs, New Jersey: Prentice Hall, 1982.

⁴⁴ US. Department of Labor, Bureau of Labor Statistics, “Volunteering in the United States, 2007,” News, January 28, 2008, http://www.bls.gov/news.release/archives/volun_01232008.pdf.

⁴⁵ Corporation for National and Community Service, Edward M. Kennedy Serve America Act of 2009, <http://www.nationalservice.gov/about/serveamerica/index.asp>.

Voluntourism has emerged from this increase in volunteering, as well as a result of a shift in the needs of today's tourist. New niches such as adventure tourism, ecotourism, volunteer tourism, and humanitarian tourism are examples of consumer demand for more authentic experiences. Today, many travelers seek a more meaningful experience that allows them to interact with the residents of the host destination. Driven by an increasing social awareness of the 'haves and have-nots', tourists are seeking ways to go beyond the confines of their resorts. They are opting for experiential learning activities as part of their vacation. Retired seniors, university students, families, and young professionals are all seeking more meaningful holiday experiences. Whether that means building a local school, tracking sea turtles, or serving meals to the homeless, volunteer tourism is just one more outgrowth of the increased consumer demand for authentic experiences.

The two largest groups participating in voluntourism are college students (including alternative spring break activities) and Baby Boomers who were born between 1946 and 1964 and are now entering their retirement years.



Tourism Cares for America Volunteer Day. Credit: Tourism Cares for America.

Volunteering has begun to be recognized by destinations for the role it might play in development, disaster relief, etc. The 2007 FutureBrand report, *Country Brand Index*, indicated that volunteer tourism is a growth area:

*As a response to disaster aid, growing global village consciousness and a need to contribute to society in ways big and small, more travellers are planning their trips around humanitarian purposes. From building homes and teaching English to working at refugee camps and participating in animal conservation research, the menu of volunteer vacation options is growing.*⁴⁶

Surveys and interviews show that people choose to participate in volunteer activities for a range of reasons. Tourists are motivated because of purely altruistic reasons; social desirability; career enhancement; cultural immersion; comradery; and education or bonding with children, among other reasons.

- **Structure of the Volunteer Tourism Industry**

Volunteer tourism relies heavily on cross-sector collaboration. Volunteer tourism typically involves people traveling from developed countries to developing countries in Africa, Latin America, and Asia.

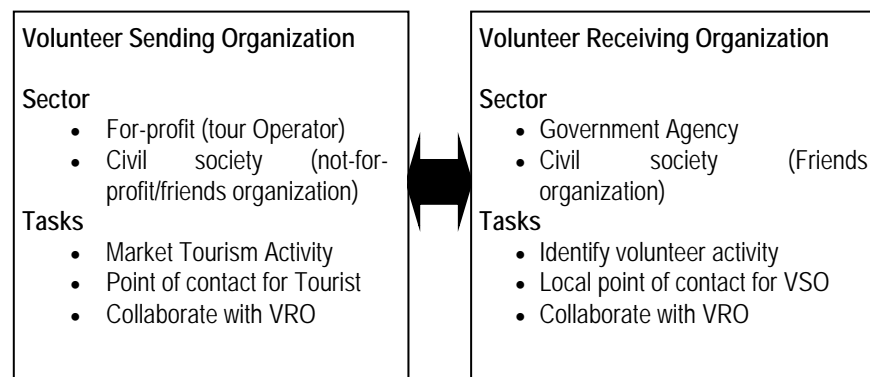
⁴⁶ FutureBrand, *Country Brand Index* 2007, p. 16, <http://www.futurebrand.com/think/reports-studies/cbi/2009/overview/>.

Box 1: Scientific, Academic, Volunteer and Educational Tourism (SAVE):

SAVE Tourism is a relatively new sub-sector of alternative tourism. It is a grouping of four types of tourists who have very similar needs. The **scientific tourist**, such as the doctoral student conducting primate research in Botswana; the **academic tourist** such as a professor teaching a short-term study abroad program in Costa Rica; the **volunteer tourist**, such as the married couple opting to work with local environmental group in beach clean-up, and the **educational tourist** who wants to gain a new skill. These types of tourists represent a compelling niche market for emerging tourism destinations that may not be able to compete with more developed tourism destinations. More information can be found at www.savetravelalliance.com.

Its activities often involve a myriad of players including government, private sector and civil society. Volunteer Managing Organizations⁴⁷ (VMO) are those organizations that are involved in managing volunteer tourism activities, either as the organization sending the volunteers (Volunteer Sending Organization, VSO⁴⁸) or the organization receiving the volunteers (Volunteer Receiving Organization, VRO⁴⁹).

Figure 1: Volunteer Managing Organizations: Relationship between Sending and Receiving Organizations⁵⁰



- Voluntourism: Lessons Learned and Best Practices**

As volunteer tourism grows, it is not surprising that so do both the accolades and criticism. Critics claim, for instance, that volunteer tourism is just a guise for rich travelers to feel less guilty when traveling to poor areas, or that it creates a culture of dependency in the local destination. However, supporters see voluntourism as a means of providing much needed resources and expertise to worthy projects while allowing visitors the opportunity to give back to the destination they are visiting and interact more meaningfully with the host community.

⁴⁷ Volunteer Managing Organization (VMO) refers to any organization that is involved in either hosting or organizing groups to participate in volunteer tourism activities.

⁴⁸ Volunteer Sending Organization (VSO) refers to the organizations (non-profit, government, or for-profit) that are the first point of contact and that assist with travel arrangements for the volunteer.

⁴⁹ Volunteer Receiving Organization (VRO) refers to the organizations (non-profit, government, or for-profit) that receive the tourists and that assist in the organization and delivery of the volunteer services.

⁵⁰ Kristin Lamoureux, *Critical Success Factors for Public Private Partnerships Involving Volunteer Tourism in US Federal Lands*. Ph.D. Dissertation, Business Administration/Strategic Management George Washington University, 2009.

Box 2: Voluntourism in Meetings and Events

One of the fastest growing areas within voluntourism is at events and meetings. According to Financial and Insurance Meetings Magazine in 2009, incorporating service projects into meetings is the “next big thing.” Industry organizations like the Professional Convention Management Association (PCMA) have incorporated “give back” activities into their annual and regional meetings such as “Network for the Needy” which encourages food donations to local charities and a large volunteering activity.

Although this is a relatively new area, practitioners and researchers have already begun to establish best practices for the industry. While there is no agreed upon industry standard or certification program available as yet, there are a number of resources available to guide volunteer tourism practices.

As voluntourism matures, more lessons learned have begun to emerge. Some of the most important ones are described below:

Partnerships: Voluntourism is sporadic in nature. Tourists come for a relatively short period of time and then they leave. The needs of the VRO however are not sporadic but rather of an on-going nature. Therefore, it is key that organizations with an established record in the host destination continue the necessary work regardless of whether volunteer tourists come or not. This fosters continuity and maximizes impact for the destination. Failure to develop relationships with partners that understand the needs of the community and have an on-going presence will not only hurt the cause in the long-run, it may also produce a less than satisfactory experience for the guest.

Community Ownership: Volunteer projects must be “owned” by the local community. Tour operators and non-profit organizations that bring tourists to do projects that they believe to be important for a host community likely face failure. Experience has shown that the community must be a part (or all) of deciding what is needed for a project to continue, be successful, and have an impact. Ideally, the host community would also be involved in the activity in some level.

Educating the Traveler: Tourism is an invasive activity. Voluntourism allows guests and hosts to interact on a very personal level. It is important that visitors understand the impact they could potentially have on the host community. At times, even the best intentions can have negative impacts. For example, the donation of clothing is a common practice. However, the adoption of a new style of clothing may have cultural impacts, fostering a transfer of traditions that was an unintended consequence of a simple gesture. Therefore traveler education is imperative to minimizing potential negative impacts, as well as helping the traveler understand what to expect.

Performance Monitoring: Continually re-evaluating the volunteer program from the perspective of the VSO and VRO is essential to ensure that real needs are being met for the host population and that the tourist benefit from the experience. Adjusting and changing programs based on this evaluation will improve the long-term viability of the VRO and VSO.

Business Development: Although VSOs and VROs may be for-profit, governmental or non-profit, operations should take into account the financial viability of the activities. Benefits will cease to exist if the VSOs and VROs are not able to continue their work due to financial constraints. Therefore, programs must be managed with the goal of creating financial sustainability.

Avoiding Dependency: Care must be taken to avoid local dependence on tourists who bring hand-outs for the community. Bringing even seemingly simple things like toothpaste, coca-cola, or used clothing may create demand for products that can only be supplied from outside the community. Additionally, from the work perspective, if residents feel that the volunteers will come and “fix everything”, that may also foster dependency. Some VSOs address this by varying their project locations and types. Other organizations ask that visitors not provide anything to the host that isn’t expressly allowed by the VSO.

Although these lessons learned primarily inform the VSO and VRO, there are lessons learned that can benefit the traveler. They are:

- Seek a well-established VSO.
- Determine if the VSO or VRO has an established history with the destination or if the trip in which you might participate is a “one-off” activity.
- Be honest with yourself about how much tourism and how much volunteering you want to do.
- Carefully assess what living and working conditions would be acceptable to you and make sure that your needs match those offered by the program you choose.
- Determine what you like to do as a volunteer and what skills you can offer and pursue them as a voluntourist.

In addition to the points above, there are several published sources of do and don’ts of voluntourism. Several are included in this *Handbook*, as well as a list of additional sources of information. VolunTourism International has published a “do and don’ts” for the traveler, as well as a detailed personal assessment (reprinted below). PEPY Tours, recipient of the 2010 National Geographic/Ashoka Changemakers Challenge, has produced a set of guidelines for responsible volunteer tourism development or “Voluntourism 101” (See Appendix 2).

• Conclusion

Volunteer tourism is a rapidly growing phenomenon that can provide multiple benefits when the activity is host-driven, financially viable, designed in partnership with credible organizations, and sustainable over the long-term. Creating an activity with those characteristics requires dedication and hard work.

For the traveler, voluntourism provides an opportunity to immerse oneself in a meaningful activity while on vacation. Volunteer tourism allows the traveler to support a local project through a hands-on work experience. The trend is expected to grow. There will be challenges along the way, but for both the travelers and the VMOs, adhering to the suggested best practices and learning from the lessons learned are key to successful, impactful voluntourism.

Advice for Potential Voluntourists⁵¹

Adapted from Via International materials

- **Getting Started**

Thinking about being a volunteer in a foreign country? Ready to test the voluntourism waters? Not quite sure whether you want to take the plunge?

The **VolunTourism Survey**, a self assessment tool with questions and advice on how to select a trip – all adapted from Via International materials, will give you a good start.

Whether you are new to voluntourism or a veteran voluntourist, take the survey first to gauge your level of interest and to determine how best to proceed in your quest of taking your first, or next, voluntour.



Volunteer environmental monitoring.
Credit: Earthwatch Institute.

First things first. Voluntourism is a special kind of travel and not everyone is suited to it. The experience starts before it even begins - - with Y-O-U! "Know Thyself" is the first step in the process of determining if this is the right kind of travel for you. If you feel like you are in tune with yourself, then you have covered more than 50% of what is required to decide if you will enjoy being a volunteer and to select the best voluntourism journey. The exercises that follow will help you get in tune with yourself, if you are not already, and will be useful even if you understand yourself well, pay particular attention to what follows:

This is a **BIG DECISION**. It involves many aspects of who you are as a person - your personal preferences and aversions, your emotional well-being, your attitude, and, very likely, a sizeable financial investment.

Most significant of all, your decision impacts other people - destination residents, fellow voluntourists, the coordinators of your trip, and your friends and family. (This last group is especially important because these folks are the individuals who will hear any post-trip griping if you did not come away with what you expected.) So, make a sincere effort and realize that your service starts NOW, with your self-evaluation!

⁵¹ This section, edited by Sandra Tassel, combines two useful documents by Via International entitled "VolunTourism.org: Getting Started" and "Trip Selection." The original documents are available at: <http://www.voluntourism.org/traveler-start.html> and <http://www.voluntourism.org/traveler-select.html>. Via International is a California based nonprofit service organization with over 35 years of experience addressing community development. Via International also sponsors the VolunTourism.org website.

We recommend that you do three things to determine whether voluntourism is appropriate for you. This essay will guide you through the following three steps:

- First, you must establish the purpose of your voluntourism experience. Why, exactly, are you planning to engage in this type of travel?
- Second, you must assess your capabilities. What service(s) can you provide? How do your capabilities fit within the context of programs that you are considering?
- Third, you must ask yourself some very difficult questions and be willing to answer them - - HONESTLY!

When you have completed these three tasks, you are ready to move to the Trip Selection phase, which this essay also covers.

Start this exercise by asking yourself a question similar to one of the following:

- "Why do I want to be a voluntourist?"
- "Why am I doing this, really?" (Am I trying to get school credit? Am I trying to find the "fountain of middle age"?)

Answering this important question is the beginning of discovering the purpose behind your desire to travel to another destination. And, no, it will not work to simply say that someone else told you to do so.

To be an effective and happy voluntourist you have to discover the fundamental reason for departing your homestead and transporting your body to another place on the globe. Understanding your motivation will help you honestly assess whether another activity might better fulfill the purpose for which you are selecting a voluntourism itinerary.

For example, you want to build your resume perhaps you would be better served by a summer job that focuses specifically on the practical applications that you need to learn in order to be more easily employed? Or, do you need service hours in order to graduate? You will spend less money by providing service in your hometown. On the other hand, if you have always wanted to travel to a foreign country, maybe you will be happiest if you volunteer at another time?



Courtesy of Volunteers Without Borders.
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In other words, make sure that your decision to combine travel and volunteering reflects your purpose and manifests sound judgment. Be sure you have examined the practical elements and analyzed whether voluntourism is truly the best option for honoring the purpose you have established.

• **Inventory of Your Service Assets (A)**

Likely at some point in your life, you compiled a resume or curriculum vitae. What you will do in crafting the inventory of your service assets (ISA) will be a slightly different exercise.

Your ISA should include personal qualities and characteristics that you would not include in your resume. For example, you may have done babysitting as a teenager and found you really liked it and got along well with children. This would be an excellent item to include in your (ISA), especially if you plan to work with children during your voluntourism journey.

Take your time to review anything you have done as a volunteer, especially if you liked the activity and found it rewarding. You may have been an usher at your church or temple. You may have coached your daughter's soccer team. These fit well within the framework of voluntourism experiences because they represent tasks that you conducted as a volunteer.

You do not want to include every detail of every activity that you did only once or twice in your life. Your ISA should credit you with service that you have rendered and feel comfortable rendering again.

- **The Difficult Questions (Q)**

Answering the following questions honestly and completely may be the toughest assignment of any that you will have to do before, during, or after your voluntourism trip. You must look at yourself squarely in the mirror when you ask these questions. Honesty is an absolute necessity for this exercise; without it, you are wasting your time and effort and, quite possibly, other people's time and effort as well.

We will assume that you have already determined where you want to go.

As for the rest, remember, you are asking yourself the following questions while looking in the mirror:

Question #1: What is my personal minimum requirement for accommodations? (For example: Do I need running water? My own bed? My own room?)

Question #2: How much money can I truly spend to pay for a voluntourism trip? (In other words, what can I afford to pay without being anxious during my entire trip because I spent more money than I should have?)

Question #3: How much time/percentage of my trip do I want to dedicate to volunteering and how much to regular tourism?

Question #4: How sensitive am I to deprivation, poverty, starvation, health issues, etc.? (For example, can I mentally and emotionally handle being with children who have no arms or legs, or cleft palates, or bloated stomachs from malnutrition?)

Question #5: What tolerance do I have for extremes in climate? (For example, is desert heat an issue for me? Arctic cold? Rainforest humidity?)



Courtesy of Voluntourists Without Borders
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Question #6: What food preferences and aversions do I have? (For example, can I eat anything that is placed in front of me? Vegetarian only? Food allergies?)

Question #7: How are my people skills? (For example, do I feel comfortable speaking with anyone, anywhere, regardless of who it may be? Only people I know? Do I like to travel alone?)

Question #8: What travel experience do I have? (Domestic? International? None?)

Question #9: What volunteer experience do I have? (Helping your brother or sister with his/her homework does not count!)

Question #10: What voluntary service would I like to perform? (You may not have a preference, but by asking this question, you will know if you do.)

- **Conclusion**

Once you have determined where you want to travel and have answered the above 10 Questions, you should be able to combine these with your Purpose and your Assets and be ready to move to the next step in this process – Trip Selection.

- **Trip Selection**

- **Introduction**

Once you have determined your **Purpose**, taken an inventory of your service **Assets**, and answered the tough **Questions**, (**PAQs**) you are ready to select a program. How exactly will you make a decision with tens of thousands of options around the world from which to choose? (And you thought we had already asked the tough questions.)

Well, this will be much easier than you think.

In this section, we will touch on the following topics:

- Step #1: Developing a voluntourism (VT) Matrix
 - Step #2: Research & Mapping of voluntourism opportunities onto your VT Matrix
 - Step #3: Reviewing Options that fit your VT Matrix
 - Step #4: Interviewing Potential Options
 - Step #5: Making a Final Selection

- **Step #1: Crafting the Voluntourism Matrix**

Set up a spreadsheet similar to the example below. The items that you identified for the "Getting Started" exercise can now be used to place into your Voluntourism Matrix. The cells in the left-hand column represent your **Purpose**, your service **Assets**, and your answers to the hard **Questions** as individual elements or (**PAQs**). The remaining columns are for organizations that you will "map" against the criteria you have established via your (**PAQs**)

PAQs	Option 1	Option 2	Option 3	Option 4	Option 5
PAQ 1					
PAQ 2					
PAQ 3					
PAQ 4					
PAQ 5					
PAQ 6					
PAQ 7					
PAQ 8					
PAQ 9					
PAQ 10					

Let's look at an example using "your purpose" only:

My Purpose: To learn more about the U.S./Mexican Border Region, practice my Spanish, and help the people of the area in whatever way possible.

For this example we will use a smaller matrix, but for the one that you put together use the above dimensions. Let's take key words from the purpose statement and put them into our matrix:

PAQs	Option 1	Option 2
Learn		
U.S./Mexico Border Region		
Practice Spanish		
Help People		
No Preference/Help Type		

You will add in the other elements of your **PAQs** in a similar fashion to build out your VT Matrix. Once you have done so, you are ready for Step #2.

○ **Step #2: Research & Mapping**

There are key elements of your PAQs that will assist you in concentrating your research efforts. Such elements include: Destination, Type of Service, Duration, Accommodation Requirements, Safety, and Price. Identify these as the "Priority" PAQs for you. (For those who really like to be organized, you may want to place these at the top of your PAQ list or even on a separate 3x5 index card.)

When you review books, magazines, or conduct a web search of voluntourism options, you will be able to determine what does "not" fit your criteria. You may also want to talk to friends and family who may have conducted a similar trip to point you in a certain direction, but remember, friends and family are NOT YOU. Their preferences and aversions are not yours.

When you find an organization that fits your Priority PAQs, then fill in the boxes with either a "Yes" or a "No" as you move down your complete list of PAQs in comparison to what the voluntourism operator provides. When you have filled out the entire VT Matrix, you are ready for Step #3.

- **Step #3: Reviewing VT Options**

You have your VT Matrix in front of you. Now you can begin to look through each VT Option and see where the "No's" are. Can you immediately cast aside any of the VT Options because they have too many "No's?" In most cases you will be able to do so.

With your remaining VT Options, begin to compare and contrast what each one offers. This may take a little bit of time, but it will cause you to really think about your priorities and what you **MUST** have as a part of your VT experience.



Courtesy of Ambassadors for Children.
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When you have conducted this exercise to a point where you have three (3) to five (5) remaining options, revisit the source from which you originally gathered information about the organization. Copy down all important contact information - specific contact person, corresponding telephone number and/or email address, etc. If you discover through this process that you are not, somehow, satisfied with what they offer in this regard, then you can cross that organization off of your list.

- **Step #4: Interviewing VT Options**

Reflect back on the specific questions that were asked when you interviewed for a job. If you were interviewed by someone you thought was exceptional, try to mimic their methodology. Prepare yourself to thoroughly examine the handful of VT Options you have left by creating a list of questions you want to have answered.

Make sure to schedule an appointment ahead of time to interview the appropriate person at the program so you can have the undivided attention of the person on the other end of the phone. You want to have a great deal of confidence that you understand "the situation" that you will confront when you start your project.

What questions should you ask? Start by "double-checking" that the "Yeses" on your PAQ sheet are correct. If, for example, you wanted to make sure that the organization has liability insurance, you can ask during your phone interview: "Does your organization have liability insurance? What coverage do you provide for someone who may be injured while volunteering?"

If you have really filled out your VT Matrix, you will be able to ask the important questions. Examples could include:

"What is your refund policy in the event that I am unable to make the trip?"

"I have children, will I be able to contact my family during my trip?"

Look for the little things that you may have overlooked in your VT Matrix and ask about these things. Take good notes during your phone interviews and make changes to your VT Matrix based on the information you gather.

- **Step #5: Making a Final Selection**

If you have really conducted your efforts with due diligence, one program should stand out in your mind as "The" VT Program for You!

If, however, you still have some reservations, you may want to have a second phone interview or discuss your findings with a friend or family member. Or you could even give us a call here at VolunTourism International (VTI) and we can provide you with any information that we may have about an organization.

Take the time to reflect on the information that you have. Even if one organization stands out, you may really like an element of another one. Are you, perhaps, willing to take the risk of selecting that VT option over another one? Realize that the trip will represent a major investment of your time, effort, and money. This may be the one and only time that you ever take such a trip. Don't you want to give yourself every opportunity to have the best experience possible? Of course, you do.



Courtesy of Tibetan Village Project.
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PEPY Tours and Voluntourism

By Daniela Ruby Papi

PEPY Tours (<http://pepytours.com/>) offers educational adventures in Cambodia with an aim to change the way participants give, travel, and live once they return home. PEPY Tours started out by offering “voluntourism” opportunities, giving people the chance to “improve the world” in a very short period of time. What we learned when starting PEPY was that we were doing two major disservices by offering trips which were focused on giving rather than learning: 1) by rushing to help, we were encouraging people to take action before they fully understood a problem or a goal, which can often lead to unnecessary mistakes and 2) we were creating volunteer experiences to match with the needs of travelers, as the nature of using visitors means adjusting timing and offerings to the availability and skills of the guests. We realized through mistakes that we have to learn before we can help, and that sustainable change takes a long time.



PEPY Tours at Angkor Wat, Cambodia. Credit: PEPY Tours

By encouraging travelers to use their vacation time to learn about a new place and the issues faced, to use their time to get angry, get interested, and get educated, we are now helping to empower them to do the real world changing once they leave. We might not be able to improve the world greatly in a 10 day travel experience, but we surely can during the 355 other days of the year with new found interests and a better understanding of the barriers faced by development initiatives around the world.

At PEPY Tours, we believe that by connecting people to educational opportunities in rural Cambodia, we are able to create a space for travelers to open up to their own potential to be agents of positive change both in themselves and in the communities around them.

See Appendix 2 for PEPY Tours’ PEPY Tours “Voluntourism: Operator Self Check Guide”.

Consumer Interest in Voluntourism

Compiled by Martha Honey



A number of recent surveys in the United States confirm the growing popularity of voluntourism.

A Condé Nast Traveler/MSNBC poll (spring 2008):

- Number of regular volunteer vacationers has doubled since 2002.
- Number of those who have volunteered at least once has tripled.
- 98% were satisfied with their experience.
- Less than 25% of those surveyed have no interest in taking a volunteer vacation.
- 55% of those surveyed would like to take a volunteer vacation.
- 75% of those who have volunteered are “very likely” to do so again.
- 91% of the volunteers believe their efforts were at least as worthwhile as donating money.
- 86% believe that voluntourism benefits both the traveler and the destination.

A Condé Nast Traveler Readers' Poll (February 2009):

- 47% interested in volunteer vacations.
- 3% regularly take volunteer vacations.
- 98% satisfied with their experience.
- 95% of those who have volunteered would do so again.

USTA Voice of the Traveler Study (November 2006):

- 24% interested in taking a volunteer or service-based vacation.
- Up 11% from 5 years ago.
- 47% of those from the 35-54 age range.

Travelocity's Annual Forecast (2007)

- Volunteer vacations 38% (up from 11% from prior year).

Cheaptickets.com (2007)

- 68% of travelers would likely use a travel website to learn more about volunteer vacations.
- 50% would consider taking a vacation for the sole purpose of volunteering.

Peter Yesawich, CEO of Ypartnership, "Taking the Kids: Family Voluntourism" (2007):

- In 2006 over 5 million households took a volunteer vacation.

CMIGreen survey on voluntourism (2009):

- 59.1% of those surveyed said they were interested in volunteering during a future trip.
- 74.4% have volunteered while traveling.
- 37.6% of respondents claimed that the availability of volunteer activity encouraged their selection of a vacation destination.
- 46.4% said they would dedicate several days to volunteering during a trip, as opposed to a day or less or an entire trip.
- 69.9% say that the most important outcome or goal of a volunteer travel experience is to "give back."
- 7.9% are willing to spend \$51 or more a day on their vacation if it meant they could also volunteer.
- 58% continued to be involved with the project they volunteered with after they returned home.

Chapter 4:

Engaging Tourism Businesses in Travelers' Philanthropy

How Companies Can Establish and Manage Travelers' Philanthropy Programs

By Jane Crouch
Responsible Travel Manager, Intrepid Travel

"To give money is an easy matter in any man's power. But to decide to whom to give it, and how large and when, and for what purpose and how, is neither in every man's power nor an easy matter." Aristotle

When your company is ready to establish a travelers' philanthropy program, it is important to do thorough research and create a project plan. This may sound like basic common sense, but it is something that is often overlooked by individuals and businesses when they are swept up in their wish to help a situation or a community. A heart-driven reaction to injustices and inequities may be your initial and important motivation. But even while your emotions are running high you should strive to gain a broader perspective and become as widely informed as possible. The information you gather will allow you to make sound decisions and set your course of action in a pragmatic and intellectually-driven manner. By doing your research and creating a plan, you are not ignoring the issue that initially sparked your desire to help or the problem that inflamed your passions. Instead you are taking steps to ensure that the assistance you provide is grounded on a complete understanding of how your support can be most effective.

'Help' that is solely based on emotional reactions may unwittingly further exacerbate a community's problems. For example, by giving to the begging child, you (and the child) may gain some instant gratification, but such donations may actually contribute to keeping that child out of school, thereby holding him in a cycle of poverty by denying him an education. Try to look at the problem or issue you want to address as a business challenge to which you will bring your management skills. Use your initial passion to fuel your travelers' philanthropy project, inspire a commitment to excellence and create the enthusiasm that will encourage your colleagues and clients to join you.



Intrepid's English teaching project, Dusun Village, Borneo.
Credit: Suzanne King.

- **Step 1: Evaluating Strengths and Deficiencies**

As the owner or manager of a travel business, you have many strengths and skills. You know the market, you know your customers, and you know the destinations or your location. And if you are successful in business, (which we will assume you are), you are probably good at keeping your finger on the pulse of a market and adapting to frequent change.

But what do you know about managing philanthropy, about effective aid or development? And how well do you really know the communities that you want to support? Do you speak their language well? Do you know their history? Do you have a deep understanding of their culture, their religion, their decision-making processes, their hierarchies, their interpersonal relationships, and their relationship with the land? Do you know who all the key stakeholders are and the extent to which they are likely to accept the intervention that you may propose? Do you know the level of the government's work on the particular need you wish to target and how various agencies might support or oppose your possible initiative?

Most people who are contemplating starting a philanthropy program find they have good answers to some of these questions, but not all. Evaluate your company's collective strengths and deficiencies with candor and care, looking at yourself and your employees to identify what resources and knowledge you already have to support your initiative. Then determine what type of additional expertise or support will be needed to ensure you have solid answers to all of the above questions.

- **Step 2: Identify the Geographic Areas and Issues You Would Like to Address with Your Travelers' Philanthropy Project**

Once you have decided that you wish to embark on a travelers' philanthropy project, and you have assessed your company's capabilities, the next step is to choose the issues you wish to address. The following broad categories may help you:

Poverty alleviation
Education
Health, social welfare, and disability
Child welfare
Agriculture, food, and nutrition
Empowerment of women
Human rights
Disadvantaged groups such as refugees or ethnic minorities
Vocational empowerment through, for example, training or microfinance loans
Animal welfare
Wildlife conservation
Environmental or heritage protection
Climate change
Disaster responses - i.e. floods, earthquakes, famine
Millennium Development Goals (<http://www.un.org/millenniumgoals/>)

Possibly your project(s) will cover several of the above issues. Few of them exist in isolation and a community that is impoverished will have multiple issues. Your challenge may be identifying how a community's needs and your strengths overlap in a way that addresses those needs. Sometimes a community's most visible priorities may obscure other needs that you are in a better position to help support.

Your travel business is not a charity; however, it can make a difference to the poorest in society. If you want to benefit a specific community could your business offer residents employment, training, or income-earning opportunities that will help address their needs? This is an important question for you to consider. In most circumstances providing business opportunities is a more empowering means of support than charitable handouts to individuals and their families.

Your company can also make a difference through travelers' philanthropy by providing contributions from your company and your guests to communities in tourism destinations. These contributions are over and above the remittances you make for tourism business activities. But the axiom of 'trade is better than aid' still holds true. It is best if travelers' philanthropy contributes to building economic empowerment and self sufficiency – through education, micro-enterprises, skills training and improved health. You don't want your generosity, and that of your clients, to lead to dependence on outside support.

- **Step 3: Weigh the Pros and Cons of Supporting an Existing Non-Government Organization (NGO) or Developing Your Own Project**

What existing organizations are working in the geographic area you want to target and in the issues you have identified as your priorities? If not in the targeted community, are there relevant organizations working in other areas of the country that have the appropriate experience and specialize in addressing this need? For example, if there is a high level of malnutrition among local children, could you identify and support an NGO already working on hunger alleviation in the region that has expertise but currently has inadequate financial resources to expand its services? Working with an existing NGO keeps you from reinventing the wheel or duplicating established programs or processes. Is the government working on the problems you want to solve? Perhaps your efforts would be most effective if you help the community write grant proposals or assist leaders in finding ways to lobby for support?

Other important considerations and questions to answer before starting a new project:

- What do you wish to achieve and what is realistic?
- What are your available staffing resources and their expertise?



- Timing: Do you intend to operate in the area for the long haul?
- How well do you know the community? Speak their language? Understand their way of life, priorities, strengths, and challenges?
- How effective is this initiative likely to be? What are the risks?
- Will the project be managed from inside or outside the community?
- How can your project avoid creating dependency? If you discontinue operating in the region, does the project have other means of support so it will be able to continue?
- Will the project hold up to external scrutiny and demonstrate accountability?
- What are the local cultural and religious beliefs and practices around charity and gift giving?
- How will you avoid scams and corrupt practices which may be common but not obvious to an outsider?

Since your primary role is operating or working for a travel business, generally it is not advisable to create and manage a local project yourself. Your travelers' philanthropy program is much more likely to be effective and sustainable if your company can bring resources to a local NGO that has expertise in the issue you seek to address, has a deep cultural understanding, and already has solutions to problems. In addition, a local NGO is more likely to be operating in the region over the long-term. However, in some cases, particularly in remote regions, local NGOs may not exist and your company may decide to initiate a local project. Take this route only if you can allocate dedicated staff towards managing the project and ensuring its success. The recommended steps, listed below, for developing a successful project will help you analyze whether you can commit the necessary time and resources.

- **Step 4: Identify and Consult Stakeholders; Learn About Their Decision-Making and Governance Practices.**

Who are the stakeholders in the community in which you hope to work? List them all and identify the linkages and hierarchies and varying degrees of vested interest. It can be useful to map stakeholders and their relationships using mapping tools or graphics. For example, make circles of like-minded groupings, illustrating overlaps of commonalities. There will be elected leaders, relevant officials within different levels of government, and other leaders who derive authority from traditional or ethnic power relationships, economic power, religious power, etc. There will be groups of people with different agendas or reasons for buying in to your project. And there will be those on the fringe or outside of the community with a less obvious involvement, but who will be impacted.

Consult ALL stakeholders, in a number of forums, and over time. There should be wide representation and culturally appropriate opportunities for all voices to contribute and be heard. It may, for example, be useful to consult with the women independently of the men, particularly in a patriarchal society, or to consult with members of "civil society" separately from government-appointed authorities. Take note of not only the voices you are hearing, but also those you are not. Work to provide opportunities for the latter group to participate in a different forum.

- **Step 5: Set Objectives and Parameters for Your Project**

Decide and clearly articulate what you wish to achieve and set a realistic time frame. It's great to have ambitious goals and high ideals, but it is sensible to set some smaller achievable steps for the first year of support. Establishing interim objectives will give you the opportunity to refine

your project and activities along the way, while you continue to learn and develop your capacities. When each small step is achieved there can be celebration, evaluation, and analysis of what can be done better. Remember:

- Decide what you and your project are, and what you are not. It is better to specialize than trying to be all things.
- Prepare a mission statement and establish a clear set of objectives that define the boundaries.
- Establish criteria for what you will support, for example:
 - Only not-for-profit or community based organizations or projects
 - Area of focus or cause
 - Who will benefit? For example, the women in Village X; the people with disabilities and their families in Community Y; the endangered wildlife in Z province; or the villagers living along the banks of the River G.
 - Must the project be environmentally sustainable?
 - Will the project become financially sustainable or self-sufficient, within a specific number of years? For example, an income generation project.

- **Step 6: Where Will the Money Come From?**

As a business owner, you already know the importance of establishing and managing a budget. Don't overlook how critical it will be for your project to have one too. After you have set your parameters and objectives in Step 5, carefully assess the cost of each step. Allow some additional contingency funds, as there may be time over-runs, price increases, or over-looked additional expenses. Then give serious thought to how you can fund each one and maintain the support for the life of the project. Contributions can be generated from a number of sources:

- From the company, for example, budgeted as a % of company profits, as an amount per traveler, or as a fee built into the cost of the trip.
- From travelers - at the time of booking, during, or after their trip.
- From foundations and other grant making bodies.
- From fund raising events, activities, and special appeals.

Give consideration to administrative overheads and how they will be funded. If you are inviting your travelers to contribute, you will have more success with your solicitations if 100% of donations will go to fund the project, with administrative costs being met by your travel company. If this is not feasible, you should ensure that no more than 10% of donated funds will be used for administrative overheads. The public is generally wary of giving to any organization that needs their donations to cover much of the overhead expenses or fees. A very clear stance here will help your ability to market your cause, and add to your credibility and transparency.

- **Step 7: Follow Sound Management Principles for Handling Travelers' Philanthropy Funds**

By this point, you will probably have decided whether your company is simply going to make some corporate donations to one or more local projects or organizations, or whether you wish to solicit your travelers to give to the organization or the cause as well. Travelers can give in various ways:

1) Directly to the local project or organization, or

- 2) Via a local foundation your company helps to create, or
- 3) To a foundation or non-profit organization based in the U.S., Australia, UK or another “home” country for international travelers with which you establish a relationship, or
- 4) Through an online service, such as CREST’s Travelers’ Philanthropy online giving portal (www.travelersphilanthropy.org).

Options 3 and 4 may make the donations tax deductible. (See Legal Issues, Chapter 6)
Ensure that donations are not deposited or held within your travel company accounts irrespective of how travelers submit their funds. For a number of reasons, donations should be managed and accounted for separately from the finances of your business.

- **Seven Principles for Managing Donated Funds**

If funds are raised from your clientele or the public via any of these methods, there are, in turn, at least seven principles which must be considered when receiving, distributing, and reporting on the use of these funds:

Principle 1: All fundraising activities are conducted with integrity, honesty, and openness.

This will help safeguard the name and public’s trust of your company and the recipient organization or NGO that is managing the local project for which funds are being solicited. When conducting fund-raising activities:

- Have clear policies and procedures and comply with them.
- Be open with your process.
- Give accurate information in your fundraising materials and beware of spin or exaggeration.
- Be aware of privacy laws and expectations – privileged or confidential information must not be disclosed to unauthorized parties.
- Be aware of copyright considerations and seek permissions for reproducing information, photographs, and logos from the organization or NGO you are supporting.
- Trust is critical and must not be betrayed.



Principle 2: Philanthropic goal must be put above personal gain.

- Management and board members of the travelers' philanthropy project or organization should publicly disclose their relevant expertise and credentials.
- Avoid any potential or actual conflicts of interest. Have each board member complete a questionnaire once a year, outlining their regular activities and their other involvements.
- In cases of possible conflict of interest or bias, require board members to excuse themselves from any vote on that issue.

Principle 3: Foster empowerment, self-determination, tolerance, and equal and fair treatment of all people.

- Projects should aim at developing self-reliance and avoid encouraging dependency.
- Encourage equal inclusion and broad community participation. Avoid all discrimination including that based on gender and ethnicity.
- Promote human rights. Be aware of common exploitive practices.
- Create employment opportunities. For example, don't import goods such as school supplies which could be produced and purchased locally.
- Ensure activities do not support any unethical or inappropriate activity.

Principle 4: Follow all applicable laws and regulations.

- In the community/country where project is located.
- In the country where your company is based.
- In the countries that are home to your donors.
- For your fundraising and promotional activities.
- Ensure key players are not involved in any inappropriate activity, for example, racist, sexually exploitive, illegal, or unsavory activities.

Principle 5: Ensure fairness, accountability, and transparency in all actions and activities.

- Clear receipting and recording of all donations and gifts.
- Donations used according to donors' intentions (having given them suitable options). If a project is completed or closed, the donor should be offered alternative options or the funds returned.
- A full description of projects and how donations are being used must be available.
- Maintain accurate accounting records.
- Accounting records should be third party audited and the audit results available to the public, on request.

Principle 6: Take care of your donors

- Whenever possible, offer would-be donors a range of options for their support, i.e., different projects, or different items or aspects of a single project.
- Keep good records of their names and contact details.
- Reply promptly and answer their enquiries courteously.
- Keep them informed about what you are doing and how you are spending their money.
- Thank donors. Help them to feel good about giving to your cause so they will give again.

Principle 7: Measure success and effectiveness

- Set realistic timelines for what you hope to achieve.
- Set measures of success in the form of interim steps on the path to your ultimate goals.
- Aim for longevity, not for short term, quick fixes.
- Establish monitoring systems. Who is responsible for keeping the project on track? Maintain periodic contact or reporting, for example, fortnightly or monthly.
- Establish an evaluation process. This can be conducted within an agreed time frame after donations are disbursed, or at specific intervals, such as annually. Include an assessment of progress against the project's aims, lessons learned along the way, and a method to analyze project sustainability and steps toward independence from donor support.

- **Conclusion**

Travelers' philanthropy can be an effective tool for improving the situation of a target community. However, the process of creating a project of this type can be complex. History has shown that projects are most likely to succeed and be effective if they are grounded on thorough preliminary research which was done with an open mind and flexible attitude, and where the instigators have undertaken broad stakeholder consultation and been prepared to change course and reprioritize based on the input received. The research must be both an in-depth analysis within the community and an honest look at the travel company's strengths, weaknesses, resources, and relevant experience.

By identifying and listening to your stakeholders, you can establish boundaries for your philanthropy. Guidance from your target community will help you set realistic and achievable goals and secure the buy-in of local leaders. If you raise and manage funds for the projects with exemplary transparency and accountability, you will gain respect from all parties, which can help to further grow support and expedite positive outcomes.

With due attention to the steps and principles described here, establishing and managing a travelers' philanthropy program can be an exceptionally rewarding and satisfying initiative for your business, your staff, and your clientele.



Making a connection.
Credit: Intrepid Travel

Working with Donors in Travel-based Philanthropy: Lessons from Basecamp

**By Lars Lindkvist, Ph.D.
Executive Chairman, Basecamp Foundation Kenya and
Director, Basecamp Explorer Kenya Ltd.**

Basecamp is a global ecotourism organization operating in Africa, India, Europe and the high Arctic. It is organized in two principal entities - Basecamp Explorer (BCE), a for-profit tourism operator focusing on destination development and management, and its not-for-profit counterpart Basecamp Foundation (BCF). The Foundation is a major shareholder in the Explorer business and responsible for developing tourism related community and conservation projects.



Basecamp's two entities are closely intertwined at the destination level and we normally chose to refer to the Explorer and the Foundation as just Basecamp. However, as we describe in this paper our approach to philanthropy in general and travelers' philanthropy in particular, we need to keep them apart in order to make clear their different roles and responsibilities. Basecamp Foundation (BCF) is the developer and driver of Basecamp's community and conservation projects and is responsible for long-term financing of the project portfolio.

Over its 13-year existence BCF has developed, financed, and managed over 35 different socially and environmentally oriented projects in partnership with many different types of organizations, and always in partnership with Basecamp Explorer. Sustainable tourism, or ecotourism, is the vehicle Basecamp Foundation has chosen for financing the projects. Consequently, we also have had to manage a large number of travelers who have become donors and social and environmental investors within our system. Besides engaging with the travelers and guests at Basecamp Explorer destinations, we also approach many other forms of partnerships in a conscientious way. Presently, we have about a dozen signed partnership agreements spreading from governments to conservation organizations, family foundations and social investors, most in the form of either a Memorandum of Understanding (MoU) or a Term of Reference (ToR).

To manage a large number of partnerships and donors at the same time is not always easy and hopefully the mistakes made over the years have some relevance to others dealing with tourism and philanthropy. There are as many ways to work with donors as there are worthwhile projects to support, but we hope that our particular experience can be useful to those of you who are looking at engaging in travelers' philanthropy to fund projects that make the world a better place.

- **Travelers' Philanthropy: Why Get Involved? A rational**

Travelers' philanthropy is an important element in the construction of a progressive society because it:

- Facilitates community and good citizenship
- Facilitates private action in public space
- Supports innovation and creates possibility for social transformation
- Generates social and environmental capital for conservation
- Provides resources for social development
- Mitigates the impact of state economic policy
- Provides moral leadership and,
- Offers a cost-effective means of delivering social and conservation services.

While our experience demonstrates that these rationales are reasonable and acceptable, none of them bear fruit in the short-term. Done well, travelers' philanthropy requires in depth planning, robust finance, competence, and a long-term perspective in order to reach lasting results. Yes, there are certainly many worthy causes to be supported that doesn't require a progressive or transformative structure; unfortunately, they never seem to last very long.

In this paper we have set out to discuss some of the requirements for progressive projects that are transformative to the local society and require higher investment levels over longer time. And we look at how they can be managed by smaller businesses like Basecamp. One of the absolutely unique aspects of travelers' philanthropy is that it has the potential for long term planning – for at least as long as the horizon of a tourism business' investment. It is easy to fall into the pattern of thinking and planning at a three to four year perspective, since many NGO's and development organizations are tied to time frames of that length. With a sustainable tourism business as the financial backbone, we can dare to look further ahead, at least five to ten years, and hopefully longer. We know that challenges including poverty reduction, adaptation to climate change, environmental sustainability simply will not be addressed in the short-term.



This brings us to another unique characteristic of travelers' philanthropy. Since one of the fundamental requirements for building sustainable tourism businesses is based on a return on investment over a long time, the basis for long-term donor funding is already there -- the visitors and potential philanthropists. Serious tourism and travel businesses have the potential to deliver consistently and sustainably to local projects through well-managed travelers' philanthropy programs.

However, with economic, political, and natural disasters causing volatility in the tourism industry,

concerns have been raised about the sustainability of tourism driven projects. In turn, this has made community based initiatives look to identify philanthropy that can go beyond the visitor stream whenever possible. If a donor can continue to be engaged long after visiting the destination, it will increase community resources and make projects less dependent on tourism revenues alone. Project financing must always strive to have a long-term perspective that reaches beyond the travel aspects whenever it is possible.

This becomes particularly important if a project is to reach deep into social fabric of a society and create sustainable effects. Here, the art of cultivating and maintaining the donors becomes a strong component of assuring sustainability. Consequently, we try to see donor engagement at the destination only as the start of a long-term relationship.

- **Perspectives on Managing Philanthropy and Donors**

Managing donors and money in philanthropy is a multi-faceted issue. We sometimes refer to it as the internal and external aspects of donor management. While the internal aspect focuses on the project itself and refers to how the project absorbs and manages a donation, the external aspect is donor oriented and concerned with the relationship between the donor and the project -- both before and after a donation has been made.

As mentioned above, travelers' philanthropy offers a very unique and competitive advantage over projects supported by other sources of finance because it allows a longer time frame for donor management and project assessment. While development and conservation NGO's are normally restricted by limited time for implementation and measuring effect of their projects, tourism-based initiatives may permit more time for assessment of project deliverables and management of donors because they are organized by tourism businesses based or operating long term in the destination.

The following sections discuss some of the key elements of how Basecamp Foundation works to create a mutually beneficial environment between the donor and the project. The major role of Basecamp Explorer, as the tourism business, is to develop a tourism product that includes the community and conservation projects as an integrated part of the visitor experience -- and by doing so, create a unique and exquisite holiday that goes beyond the normal!

- **Need Driven vs. Donor Driven Support**

In all forms of philanthropy, there are crucial differences between need driven and donor driven financial, material, or volunteer donations. It is perhaps even more so in travelers' philanthropy where donors sometimes have very personal experiences that guide their feelings and emotions and influence their decision making on giving.



Basecamp meeting with Maasai, Kenya.
Credit: Peter Jordan

Sometimes, as we struggle to find the funds needed to carry on with our community and conservation projects, we come across donors that are willing to share their wealth but for a different cause than the ones we, in partnership with the host community, have elected to support. While it is difficult to say no to such an offer, there might be important reasons to do

so. For example, the support is for a project that is not considered a local priority or while worthy, the internal capacity for carrying out the project is lacking.

A fundamental principal in Basecamp's travelers' philanthropy work is, as far as possible, to promote "need driven" not "donor driven" support. The success of a project is multiplied when there is a clear baseline of community identified needs to provide a template for selecting projects. We refer to this as "local ownership" of the project where the level of community engagement and local support in the project is high.

At times the community may not be aware of a more abstract sustainability "need" such as climate change which is not yet felt as strongly as, for example, poverty. However, Basecamp's experience is that as soon as climate change is brought forth in terms of the rate of extinction of flora and fauna globally and the "need" for local adaptation and mitigation is explained, community awareness is raised and it is often embraced as a local "need". Local ownership and relevance is thereby created.

In attempting to create a checklist of "be aware" issues with regards to donor driven funding, Basecamp Foundation tries to keep in mind the five following rules of thumb:

1. Core Competence

Projects where the relevant skills and competence are not readily available should best be avoided. However, the risk can be managed in cases when a strong partner with the right competence comes onboard and takes a lead role in the project. A good example is the partnership, roles, and responsibilities between Basecamp Foundation and Africa Impact, a specialist organization on Voluntourism. In this case, the partners decided to work together in close collaboration although Basecamp at the start had marginal experience in the field of voluntourism and would not have initiated the project without a core competence partner.

2. Over-Committed

Over-commitment is a well-known problem to most of us. There are so many interesting and important causes to support that it is almost impossible to say no! Yet, over commitment turns out to be one of the biggest reasons for creating a "lose-lose" circumstance instead of a "win-win" situation. The donor loses his or her money with little or no return, the project facilitator (Basecamp) loses credibility and trust in the market and with the community, and the community loses faith, while the problem remains unsolved. This is a situation where the project facilitator needs to be diligent and assess the internal resources carefully before committing to take the money from the donor and promise results to the community.



Naboisho Conservancy, Kenya.
Credit: Basecamp Foundation

To exemplify the risk of over-commitment, this little story can be useful. Late in 2008, we were approached by a family foundation that had visited Basecamp Masai Mara and was willing to fund a community health center in a nearby Maasai village. The project fit well in under a larger program called Basecamp Green Villages and Mara Naboisho Conservancy. Basecamp Foundation had recently established a private conservation area outside the Masai Mara National Reserve on private Maasai owned land. The purpose of the Green Village project surrounding the conservation area was to support the building of more secure and self-

sustained local communities by targeting several priority areas for development and conservation at the same time. The areas where health, climate and energy, poverty reduction through job creation and conservation of wildlife, i.e. all within community defined need areas with a plan for implementation.

So what was the problem? The family foundation that was interested in funding the project wanted a quick proposal against which it could disperse a donation before end year in order to activate its annual quota of funds. However, looking at some of the internal aspects of Basecamp Foundation's organization at the time, there was no guarantee it could mobilize enough human resources in order to give a guarantee to finish the project in time. As tempting as it was to say yes to a relatively large donation -- \$50,000, we made the decision to ask for an opportunity to apply the following year – knowing there would be competition over priorities and new project proposals. How did it end? Eventually the funding was approved in the following year's budget. The project started on time and is now near completion. One of the donor board members later mentioned that a significant factor in winning approval was the fact that Basecamp had originally said “No” and outlined its logic for doing so. This, the board member said, helped instill trust in the transparency and governance structure of Basecamp Foundation.

3. Spread Too Thin

Spread too thin is perhaps the least worrying of the five aspects behind rejecting funding. The worst-case scenario is that the project has little drive and delivers below its potential. To exemplify this, let's take the example of one of Basecamp's gender sensitive projects, the Basecamp Maasai Brand (BMB). BMB has been up and running for over six years. It engages more than 100 Maasai women in training and awareness building around traditional Maasai handicrafts. The women represent the six poorest villages around Basecamp's Mara destination and the project also provides a platform for learning and understanding of deep cultural values. At the same time, issues such as environmental sustainability, HIV/AIDS, and microfinance are integrated in the training. The project is global fair-trade certified and the women keep a major portion of the money from selling their artifacts. The quality is high and a proof to that is that ABC Carpet & Home in New York City took some of the products into their collection in 2008.



BMB Fair Trade Maasai Crafts, Kenya.
Credit: Basecamp Foundation

However, Basecamp has spread itself thin in relation to the huge untapped potential imbedded in the BMB project. The project is by no means a disaster, but is clearly delivering below its potential. BMB has in its lifetime generated about \$150,000 in direct income for the women. Given the quality of the work and its inclusion in the collection of a major New York design and decoration firm, the project's potential income generating capacity is estimated to be three to five times higher. Why is it not delivering? Given that the BMB project was competing with over 30 other Basecamp projects that needed attention within the same time period, the resources required to develop new international markets and distribution channels was simply not there. When you spread too thin, you will rarely realize the full potential and depth of a project.

4. Over-Reporting

It may be argued that “over-reporting” is a less common problem than “under-reporting,” i.e. that we disregard the importance of staying in touch with our donors and as a result lose out on receiving renewed support. However, when conservation organizations, philanthropic foundations, or even governments through their aid and development organizations finance your

project, the reporting may become overwhelming for small to medium sized projects. It is always smart to look at the grant reporting requirements at the same time as you consider writing the proposal. Try to strike a balance between the size of the grant and the reporting requirements. Sometimes donor institutions may reduce reporting requirements due to the size of a grant – but this is unusual.

The case of private donors is quite different and you come across everything from quite hefty demands on reports to not wanting reports at all. In the latter case, it can be quite tempting to accept money with no reporting requirements attached. However, there is self-interest in reporting for the simple reason that by keeping in close touch with the donor, you increase the likelihood of renewed funding in the future.

Basecamp sends out quarterly reports based on the same standard format for all projects. The reports include donor newsletters as well as financial reports for annual audits. With a large number of projects running at the same time, standard reporting is of great help. So far, our private donors and Corporate Social Responsibility (CSR) partners have accepted the standard format as a streamlined reporting system. This does not mean that other forms of communication are not needed. On the contrary, staying in touch with donors with the support of web and social media is extremely useful in between the quarterly reports -- but this is different and does not replace the formal reporting described above.

5. Difference in Priorities

Difference or mismatch in the priorities between the project and the donor can have many aspects. One has to do with “need driven” versus “donor driven” funding, which we talked about earlier. This aspect is mostly in play before the onset of the project and therefore easier to manage since the option to say “no” to donor support is still there. Another aspect comes into play when the project is operational and the donor seeks to alter the terms of engagement by putting forward new demands for the project. The demands can also originate from a project partner, or a community member who seeks to influence the project and the donor, and by doing so suddenly make the project unstable and complex to manage.

This can happen, for instance, when the CEO or the project manager of a funding organization is replaced and the new person that wants to put his or her profile on the organization -- including the CSR profile. Such situations can easily jeopardize the entire purpose of the project by leading to changes in activities, overall goals, and even funding can be at risk of being withdrawn from the project.



HIV/AIDS Awareness, Kenya. Credit: Basecamp Foundation

Basecamp Foundation has experienced a few such cases. The lesson learnt is that whenever possible; try to institutionalize the partnership before the onset of the project. One way of doing this is to develop clear Terms of Reference for the project and/or Memorandum of Understanding between the partners, including the role and responsibilities of the donor. To institutionalize each and every partnership is not always practical, especially for small projects

where it might be more relevant to develop a deeper personal relationship between the project and the donor. This can be an efficient way to mitigate potential conflict in a project!

- **Establish a Policy that Supports Your Travelers' Philanthropy Work**

Many of the potential conflict areas in donor and project management can be met at an early stage and effectively mitigated by having a clear policy for selecting projects and their expected deliverables. At Basecamp Foundation, we have developed a set of criteria that clarify the principals by which we want to execute projects. It also, to some extent, supports the division of responsibilities between the donor and the project, thereby lowering the risk of conflict at a later stage. An umbrella statement that includes cultural, social, socio-economic, and environmental factors and the role of tourism govern the policy. The statement looks like this:

- A) Basecamp Foundation encourages the development of projects that support environmentally friendly and sustainable practices, which include practices that provides due recognition of local culture and the social fabric.
- B) Basecamp Foundation recognizes the value and necessity of developing enabling environments for sustainable projects through broad professional partnerships, at the local, national, and international levels.



Koiyaki Guide School, Kenya. Credit: Basecamp Foundation

- C) Basecamp Foundation supports project activities that promote dialogue between tourists and local communities as well as local, national, and international dialogue on the value of sustainable tourism and best practices.

The following 15-point checklist has been included to provide a frame for Basecamp Foundation's project selection policy. The criteria are not listed in any particular order and projects that do not meet all the criteria are not automatically excluded. While a case-by-case evaluation is carried out before approval or disapproval of a potential project, Basecamp Foundation favors projects that address:

1. Priority

Projects should fall within the generic target areas – the Basecamp Big Five. These areas were established as a way of narrowing down and keeping focus in the project portfolio:

- *Conservation (nature, biodiversity)*
- *Capacity (education, leadership)*
- *Climate (climate change, energy)*
- *Culture (community)*
- *Care (health, awareness, well-being)*

2. Uniqueness

Its uniqueness is that the project is not likely to have taken place without Basecamp's involvement.

3. Impact

Reduced negative impact and maximized positive impact from tourism related activities on the environment as well as on communities.

4. Transformation

That project activities contribute to long-term positive change in the society and/or environment resulting in increased sustainability over time.

5. Causes and Effect

Project outcome should show clear, causal relationships between the adoption of better practices and indicators for improved environment, socio-economic factors, and culture conservation.

6. Assessments and Evaluation

Clear and measurable effects in the form of outputs, outcomes, and other indicators attached to each project as well as indicators for monitoring progress and performance towards achieving final goals.

7. Partnership

Ways of identifying and addressing potential social and/or environmental issues by demonstrating professional partnerships including local community, relevant knowledge and resource organizations and donors.

8. Leadership

Ways of promoting, stimulating, and lending local leadership in order to secure values and long lasting change through community involvement.

9. Entrepreneurship

Projects designed to ultimately become self-sustained through sound venture practices, which delivers benefits over long-term, i.e. after project funds are terminated. This is regarded a deeper form of financial sustainability.

10. Replicable

Projects should show concrete examples of how results can or will be replicated. Basecamp favors projects with high replication value.

11. Dissemination

All projects must include an information dissemination component to share lessons learned.

12. Co-financing

Projects must be attractive and eligible for international fundraising purposes. Projects must clearly document potential sources of co-financing at a flexible ratio. Basecamp Foundation will give priority to projects with higher co-financing ratios and possibilities for matching funds. In-kind contribution will be assessed on a case-by-case basis.

13. Cost effectiveness

Project execution should prove to be cost effective in relation to the expected effects.

14. Internal Capacity

Adequate internal capacity and financial and human resources must be identified and made available for successful implementation and management at the individual project level.

15. Communications, Marketing and Branding

Any project showing the ability to attract proper and positive third party attention in society, within media, amongst social entrepreneur networks, in nature conservation networks, etc. also shows higher levels of sustainability.

- **Follow the Money**

As mentioned earlier, good donor management in travelers' philanthropy is concerned with the communications both before and after funds have been given to a project. What does the website communicate about a particular project? Does it attract donors? What comes out through media cover and press releases? Does it create added value to the project and the potential donor? These are important questions to answer as you approach potential donors.

A different aspect of donor management looks at how projects provide good governance structures, through, for example, transparency in financial reporting and democratic decision making between partners. An example of Basecamp Foundation's reporting structure is given in the next section entitled *"Keep the Donors in the Loop of Things"*.



Barack Obama visits Basecamp Masai Mara, Kenya.
Credit: Basecamp Foundation.

What binds the two perspectives close to each other is what we usually refer to as "follow the money." This is the link between understanding why people give, how to give, how the support trickles down to the project, what degree of transformation it has on community and environment, and how this is communicated back to the donor. The next story describes the "follow the money" process in one of Basecamp Masai Mara's projects in Kenya.

Basecamp's "Mara Bushbuck" project combines the improvement of wildlife habitat and carbon sequestration. For this project, 50 acres of riverbank habitat has been leased from four different Maasai landowners for a period of 30 years in order to restore a critical piece of eroded habitat. The reason for calling it the "Bushbuck" project is that this particular species requires intact forest/bush vegetation in order to thrive. The idea was simple: if the Bushbuck would return, the project would have successfully reforested the area. And, if it were reforested at a rate acceptable to the Bushbuck, the number of surviving g trees would be significant and, this would

have a positive impact on climate change through carbon sequestration, as well as reduced levels of erosion of organic material into the nearby river.

When the Bushbuck was introduced in the description of the project, the idea of CO₂ and erosion becomes even more compelling and appealing – in most cases this is why people chose to give. Technically, the project is important enough to interest large-scale funding mechanisms through programs such as REDD (Reduced Emissions from Deforestation and Degradation). But it is unlikely that small to intermediate travel donors would be as attracted to the REDD argument as much as to the Bushbuck story – after all they are traveling philanthropists on safari!

Posted on the web and carried in the local paper, this project becomes an example of how communication may take place in a relatively simple way before a donor has decided to support it. On top of that, an invitation from a lodge or tour operator to take guests see the project and participate in planting trees to offset the carbon emissions from overseas flights might just take away any of the remaining doubts – seeing is believing!

To honor the complexity surrounding the planting of trees and off-setting flight carbon, some in-depth explanation on how the project is structured to deal with sequestration rapidly becomes necessary and must be provided as donors express real interest in participating. Keep the threshold low in the beginning of communication and let the donor decide on the level, but be proactive and prepare well in advance to be able to supply critical information surrounding the project.



One of the more crucial obstacles to giving is “how” you give. What is the actual payment structure that a project uses? At Basecamp we offer to give “where you are,” meaning that you can give directly at the actual destination where the project takes place or you can execute a payment through one of our foundations registered in Norway, Kenya, India, and the United States. Regardless of where the donation is physically transacted, it always loops back through the “Mother” Foundation in Norway. This is to keep absolute control on the flow of donations -- “follow the money.” This structure was chosen to provide transparency as well as tax benefits, whenever applicable. Basecamp Foundation Kenya is the principal “spending” arm responsible for reimbursing project costs and reporting back to the donors. In this way, it is possible for the donor to follow the money from where it was donated, through the “Mother” Foundation’ accounting procedure, into the individual project and back to the donor.

As you report back on projects try to use all available means including newsletters, photos, web and social media. It is seldom the case that we over-communicate, but rather the opposite. Much of the communication can take a “light” form as described in the next section, but there is also a clear need for more “weight” in the communication through third party confirmation,

evaluation, and audited data. Finance obviously needs formal auditing, and in the “Mara Bushbuck” project the number of surviving trees must also be independently audited.

“Follow the money” has become one of Basecamp’s fundamental principals in its philanthropy work. An important reason for this is that donors seem more willing to give when they feel it is both simple and safe to do so. And it doesn’t really matter if we are talking about “earmarked” funding, “basket” funding or “neuro-philanthropy” where several donors come together to contribute to one large project -- as long as there is a governance system for transparency and donor integrity.

- **Keep the Donors in the Loop of Things**

Arguably, just as in the case of a business, one of the most important things in travelers’ philanthropy is to maintain what you have previously worked up -- your donor market. At Basecamp Foundation, we do not have a person dedicated full time to donor relationship management, although we would like to. With a growing project portfolio and multiple sources of support, donors rapidly become many and it becomes difficult to stay “ahead of the game” without having established some reporting procedures. To handle this, Basecamp Foundation has chosen to use standard reports for all donors.

Two different types of standard reports are used, a “light” version for donors and a “heavy” version for the “Mother” Foundation, both sent out quarterly. The “heavy” version is also available for donors on request. The “light” donor version is a personalized report in the form of a quarterly newsletter, and a common design is used for all projects. Along with the newsletter you need a database that keeps track on the relationship



Tourists at Basecamp Masai Mara, Kenya. Credit: Basecamp Foundation

between donors and projects – you definitely do not want to send the wrong report to a donor. The “heavy” version is a project development and deviation report that comes with the project’s account attached. Such a report may not be what a small donor wants to receive – but is important for project governance reasons.

At the end of the year, a consolidated projects report is produced for all projects for the purpose of auditing by an independent certified audit firm. The audited accounts and activities are reflected in the Annual Review, which is available by April/May the following year. The Annual Review, as opposed to an annual report combines the previous year’s achievements, present status, and points out the focus, aims and goals for the future. A copy of the Annual Review is sent to each donor. This may all sound like quite tedious work. It is not too bad once the procedures have been established, and we promise that it is the best investment you can make in managing donors. ***Never stop communicating with your donors – and mix the formal reports with light, compelling and fun stuff!***

There are, however, situations where your own standard reporting does not meet the requirements for reporting set by the grant maker, e.g. funding institutions such as international aid and development organizations, which often use a fixed format for reporting, and is normally a precondition to the approval of any proposal. The reporting format used by many funding institutions today is based on the “logic framework” approach, also widely known as Goal Oriented Project Planning (GOPP) or Objectives Oriented Project Planning (OOPP) developed by USAID as early as 1969.

- **Trends and Directions for Travelers’ Philanthropy**

It is difficult to say anything definite about trends in giving. More adequate is perhaps to talk about preferred direction in philanthropy -- the way we would want to see travelers’ philanthropy develop. What is it that we see as important trends to take notice of in future travelers’ philanthropy support to local communities and conservation?

One could argue that regardless of the reasons for giving, direct support to worthy causes is always valuable and we need not to be too focused on the “technical” side of philanthropy. Perhaps we should be more focused on the personal drivers of giving, such as happiness, self-esteem, and meaning and motivation in life. Those are all important attributes, which are embedded by the act of giving. “Giving” gives a deeper sense of belonging, both to people and to place. We could actually talk about a force of giving. Once we start, it is difficult to stop. Indeed, there is even talk about philanthropy addicts, people who gets their kicks from giving. Well, is that so bad, as long as it does some good?

In all of the projects Basecamp has been involved in over the years, we have experienced a lot of happiness and proud action by those who have joined our travelers’ philanthropy programs -- regardless of the character of the project or the size of the contribution. We strongly feel that it is important to recognize the personal drivers in giving but, as an organization that facilitates a reasonable amount of support to tourism-related projects, we also need to define some of the values that make it worthwhile for us to engage. Below is an attempt to capture some of the expressions used in this essay in order to give ourselves some preferred direction as to where we are



Solar panels, Basecamp Masai Mara, Kenya.
Credit: Basecamp Foundation



Tree planting, Basecamp Masai Mara.
Credit: Basecamp Foundation

heading with travelers' philanthropy. At least seven key words seem important to highlight and remember as we move ahead:

1. Complexity

Recognize Complexity before Generality – social fabric and ecosystem design is seldom as simple and straightforward as it often seems at the onset of a project.

2. Partnership

Aim for Partnership before Individual – be careful in entering a development or conservation project without defining the crucial partnerships where adequate knowledge and professional experience is secured in relation to the project goals.

3. Investment

Consider Investment before Charity – in order to achieve deep felt effect and lasting transformation in the society, the idea of looking at philanthropy as investment with an expected return (ROI) is becoming more and more common. The chart at the end of this section briefly describes the thinking around innovation, transformation, and investment levels in travelers' philanthropy.

4. Sustainable Change

Prepare for Sustainable Change before Status Quo – the point of developing and operating community and conservation projects is not to provide for the status quo. The very point of the project should be to create lasting change -- transformation. And remember, if your organization does not change and develop over time along with its projects, it is unlikely it will deliver the change it is seeking.

5. Proactive

Be Proactive before Reactive – leadership requires clear vision and direction. As soon as we lose sight of what we are actually trying to achieve through transformation in the society, the work becomes reactive. Need driven philanthropy is hopefully an answer to a felt need in the society and it should always be cautious of becoming a treatment rather than a way out of an unsustainable pattern. Help to self-help may be a slow process, but it has almost always proven to be more efficient and effective in creating lasting change. However, if being proactive is the preferred approach, it should not hinder the provision of much needed relief projects when disasters occur. There is good reason for both approaches.

6. Long Term

Think Long-term before Event – the aspects of time has been discussed in previous sections. It is worthwhile pointing at the opportunity of attaching the project's time perspectives to the perspective of business investments. One of the most efficient ways of protecting a tourism investment locally is to invest in the local community and surrounding environment. Hence, there is little reason to look at short-term development projects, and all the reason to take advantage of the long-term presence of the business for developing deeply felt, resilient, and transformative projects, all of which require time.

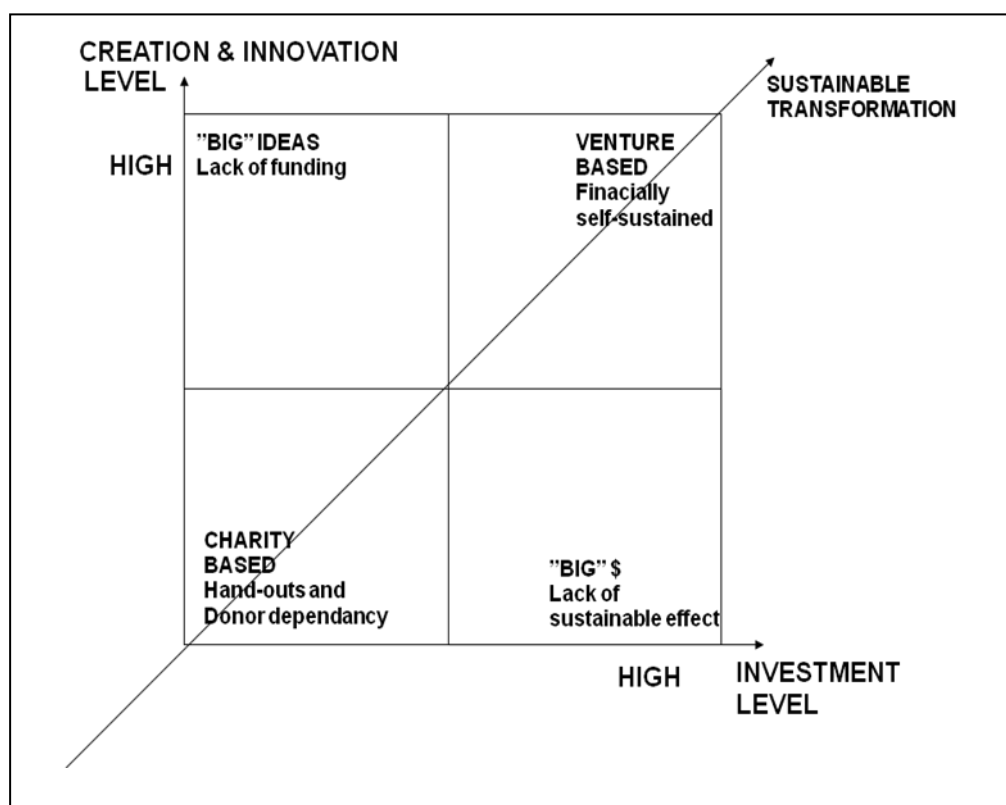
7. Professional

Balance Professional against Interest – the “feel-good” factor and personal interest in philanthropy versus professional approach and intelligent decision-making is a bit like a double-edged sword. Both sides of the blade need to be worked on to create a sharp, durable, and functional tool. If there is an imbalance, there is also a risk that travelers' philanthropy either becomes nothing more than an academic exercise or harmful handouts.

In summing up, the key words in this section are: complexity, partnership, investment, sustainable change, proactive, long-term, and professional. The risk is always that words of this kind only become “buzz-words.” But put together in this setting, it hopefully makes sense and gives some guidance to future travelers’ philanthropists. In essence, remember that:

“We travel in recognition of the complexity in the societies and environments we visit and seek to locally support sustainable change by proactive investments in long-term professional partnership projects”

- **Investment – Innovation – Transformation Matrix**



The matrix above describes the principal relationship between investment and innovation levels and their potential effect on socio-economic and cultural transformation in society. Since much of sustainable conservation today is driven by the involvement of local community, the matrix is also relevant to transformative conservation.

The lower left box points out the risk of engaging in projects that have little or short-term funding and takes little notice of the complexity in society and ecosystems (low level of innovation). The result is normally non-transformative and unsustainable and is at the risk of developing donor-dependency.

The opposite corner of the matrix (upper right) is meant to describe a situation where more long-term and higher levels of funding, often in the form of investments, lead to financial self-sustainability, with the ability to create deep change in the local community. An example of a project that has the potential to develop and graduate in the upper right corner is the Mara

Naboisho Conservancy, the private reserve outside the Mara which has been created by the Basecamp Foundation.

Basecamp Foundation recognizes the value of projects, which develop along the entire diagonal axis of the matrix, as long as the purpose is well defined. However, we seek to focus more on developing projects in the center and upper right corner for sustainability and transformation reasons. Annually, we try to define all our projects as to where they presently are placed in the matrix, and to where we would like to see them develop in the future.

Communications and Marketing of Travelers' Philanthropy Programs

By Andrew Bill, President
Siera Marketing

Premise:

The most sustainable philanthropy programs are those that complement and support commercial enterprise. Travelers' philanthropy can and should be integrated into your company's overall marketing effort.

Goals of Travelers' Philanthropy Communications:

- Increase flow of donations to sustainable programs
- Position program(s) as a company asset, a lure for prospective travelers, and a reason for past guests to return

Strategies:

- **Customer Relationship Program**

Your database is your most valuable asset. Consumers who have shown interest, who are about to travel or who have traveled with your company are the best promoters (word-of-mouth) and the best prospects *if they are properly managed* with frequent communication and loyalty recognition (incentives).

Information on your travelers' philanthropy program should be front-and-center in all points of contact:

1. Pre-trip: pack of supplementary information (packing lists), tickets, pack of postcards that promote the trip, etc.
2. During the trip. Every itinerary (not just those in the region of the program) should include an audio/visual presentation with take-away materials (including a donation form) and, where possible, excursions to see the program in action. Being there is the most powerful motivator of all.
3. Post-trip: feed-back forms to measure company/employee performance
4. E-mail/mail alerts (news, deals)
5. E-newsletter: company news, new products/services,
6. Calendar flags (birthday, year-anniversary of trip, etc.)



Comments from a Travel Partner on Customer Relations:

"We use a 3-fold outreach approach: 1) in pre-trip info we send all the project info and links. 2) On the trip, guides also talk about the project and donation opportunities. 3) Follow-up survey and info contains donation links as well, via email. We used to do hardcopy but just switched." Robin Neal, Safari Ventures

• Concepts to Encourage Donations

1. **Make giving EASY.** Your "ask" should be succinct and to-the-point, stressing situation, immediate need, suggested donation and want to donate (printed form, link).
2. **Encourage REPETITIVE Donations.** Take a cue from the big NGOs like Oxfam, Save the Children, World Wildlife Fund, etc. Their communications encourage regular (monthly or annual) donations of low amounts. One-time donations should be the second option.
3. **Online Donations.** All your e-mail/Internet communications should have a direct link to a website giving portal such as Travelersphilanthropy.org's donation form.
4. **Matching Funds.** If the donation is made by a certain date (near future) it will be matched by a donation from your company (up to a certain amount). This leverages your company's participation.
5. **Travel Vouchers.** An alternative to matching funds, you might reward donations with a certificate for a matching discount off the next trip. This idea has the advantage of encouraging repeat bookings. CREST has suggested a cross marketing system among all the travel companies in CREST's Travelers' Philanthropy program -travelers who give at least \$250 to one company's Travelers' Philanthropy project can be used with any of the other companies in the CREST Travelers' Philanthropy program as a coupon for \$250 off the trip.
6. **Keep It Personal.** Donations flow more easily if there is a personal connection between the donor and the recipient. This connection can be created in a number of ways:
 - **Photographs and testimonials** from actual benefactors
 - **Direct communication** (letters) for the more generous donors
 - **Detailed stories** about improvements and what they mean for individuals

Comments from a Travel Partner on Encouraging Traveler Donations with Personal Connections to the Project:

"We're incorporating a lot of these ideas into our guests' communications. When guests are on site, the biggest thing for them is an afternoon talk with the founder. It conveys the reason behind why we are doing this, and they get teary eyed and want to help." Laura Ell, Jungle Bay Resort and Lodge, www.junglebay.com

Role of the Guide – On-site:

“Our local guides are the drivers of the program and provide the experience that makes guests want to give back. We also have predeparture information that has proven to be the biggest success factor, plus the guides bringing those elements of program positioning into the tourist experience.” Sonya Bradley, Country Walkers, www.countrywalkers.com

- **Public Relations**

No matter if you are approaching a newspaper or working the social networks, getting “ink” is a lot easier if you are touting your company’s generosity *as well as* its products and philosophy.

- **Website**

“Sustainability” is no longer a company asset; it’s a business necessity. You need to position your “green” qualifications in a prominent position – banner on landing page and/or a primary link.

The page (s) devoted to your programs must be regularly updated, with dates, new photos and dated quotes. If the pages aren’t moving it’s easy to suppose that the programs aren’t either.

Travel Partner on Importance of Websites:

“Almost no one donates at the project site unless they have brought soccer balls etc. The guides aren’t comfortable taking money. They direct people through the website, and the guests like that.” Sonya Bradley, Country Walkers, www.countrywalkers.com

The Ask – Or is it the Offer?

By Sam Ham, Ph.D.

Department of Conservation Social Sciences, University of Idaho

If I were to summarize in a single sentence the core strategy for a travelers' philanthropy campaign that stands the greatest chances of success, it would be:

Develop an experiential product that leads travelers to care about the place, and then give them an opportunity in the immediate time frame to act on their caring.

Caring is at the heart of every philanthropic act, including travelers' philanthropy. Gifts made in the absence of caring are usually given with the expectation of a material or otherwise *extrinsic* return of some kind. But the expected reward for philanthropic giving is largely *intrinsic* in the sense that it serves mainly to bring happiness to the donor. I believe that understanding this difference is a key to successful "asking." But there is more to it.

Successful travelers' philanthropy programs target the heart first. Their developers know that although less-philanthropically inclined travelers might also choose to participate, the true philanthropists are only reachable with a heart-based appeal. Indeed, the sense that happiness is achieved by making a positive difference in the world is at the root of every philanthropic act. If we understand philanthropy as a very self-serving (even "selfish") behavior we are going to be more successful in stimulating travelers to give. When people give from the heart, they do not feel they are sacrificing or giving up anything. Rather they simply feel happy to have been part of something good and important, and many are likely to feel grateful to you for giving them the opportunity to do it. From their perspective, your request is perceived not as an "ask" but rather as an "offer." Recognizing the distinction between asking and offering is vital to the success of a travelers' philanthropy program.

If you feel sheepish about asking your customers to give their money in support of local conservation or humanitarian efforts, you probably haven't yet convinced yourself that you are giving the donor an opportunity for happiness. While fundraising and soliciting philanthropic contributions appear similar on the surface, they really are quite different things. From the perspective of the donor, the motivation to contribute philanthropically is different from the motivations that drive other types of donations. While many people make charitable contributions for largely philanthropic reasons, other motives (qualifying for tax deductions, peer pressure, social desirability influences, etc.) often are part of their thinking. In philanthropy, however, these other influences fade into the background. True philanthropy is based primarily on the intrinsic motivators of love and caring. Appealing to these motivators when you make your request is almost always a good idea, and will strengthen your own conviction that your request will be perceived more as an "offer" than as an "ask. When I train travel operators and guides in developing successful philanthropy campaigns, I stress this



Visitors with Lindblad Expeditions guide, Baja California, Mexico. Credit: Sam Ham.

is different from the motivations that drive other types of donations. While many people make charitable contributions for largely philanthropic reasons, other motives (qualifying for tax deductions, peer pressure, social desirability influences, etc.) often are part of their thinking. In philanthropy, however, these other influences fade into the background. True philanthropy is based primarily on the intrinsic motivators of love and caring. Appealing to these motivators when you make your request is almost always a good idea, and will strengthen your own conviction that your request will be perceived more as an "offer" than as an "ask. When I train travel operators and guides in developing successful philanthropy campaigns, I stress this

distinction. Both the premise and promise of travelers' philanthropy is that it is a very selfish act on the part of the donor. As operators, we're simply giving them a chance to serve their own interests.

- **Making the Offer — Lessons from Two Studies on Traveler Giving**

Over the past decade, my own research has shown how intrinsic the motivations of traveling philanthropists can be. In two studies sponsored by Lindblad Expeditions (one in Galapagos and the other in Baja California), I interviewed 146 of Lindblad's guests as the starting point for designing what turned out to be very successful communication strategies for two philanthropy campaigns. To design a compelling strategy I had to first determine (1) why Lindblad guests would choose to donate to a fund for local conservation or humanitarian efforts; (2) what would dissuade them from donating (their doubts, reservations, etc.); and

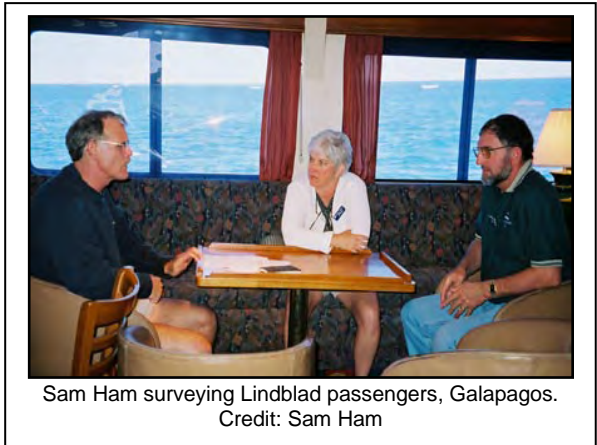
(3) whether there were any normative influences (e.g., the perceived opinions of other people) that would influence their decision whether to donate. Following a well-established procedure for conducting such interviews (called "belief elicitations"), my discussions with guests were in free-response format, meaning that the questions were open-ended and lists of alternative answers were not provided for respondents simply to check off. Rather, they engaged in focused conversation about each of the three topics. After a brief outline of the purpose of the study (which was "to learn from you about how Lindblad Expeditions might successfully promote the Galapagos Conservation Fund to future passengers such as yourself"), I asked each guest three pairs of questions.

1. What do think would be the advantages, benefits or good consequences that could result if someone like you donated to this Fund?

2. What do think would be the disadvantages or bad consequences that could result if someone like you donated to this Fund?

3. Are there any individuals or groups, whose opinions about such things actually matter to you that would approve or be in favor of your donating to this Fund? Who would they be?

4. Are there any individuals or groups, whose opinions about such things actually matter to you that would disapprove or not be in favor of your donating to this Fund? Who would they be?



5. What factors or circumstances would make donating to this Fund easier for a person like you?

6. What factors or circumstances would make donating to this Fund more difficult for a person like you?

As guests responded to each question, I followed up with in-depth probing to ensure that each person had exhausted the range of responses that were salient to each question. Only the results corresponding to the first four questions are reported here since guests' responses to questions 5 and 6 revealed no major facilitators or barriers pertaining to the ease or difficulty of making a donation (other than needing to know where and when a donation could be made). In addition, it is from their aggregate replies to the first four questions that the philanthropic motive of prospective donors conspicuously emerges.

When travelers mentioned the reasons they would engage in philanthropy (i.e., the positive consequences they thought would result from donating), extrinsic reasons such as getting a tax deduction were rarely mentioned. In fact, tax deductions were almost never mentioned (Table 1). Instead, these **travelers stressed the personal satisfaction that comes from knowing their travel has made a positive difference in the place; and they stressed the gratification they would get years later when something triggers their memory of the place, and with it, the recognition that the place is somehow better off simply because they have been there.** Needless to say, such a line-item will not be found on an IRS Form 1040 or its tax form counterpart in any other country. In addition, many guests said they would be more inclined to donate if they fully trusted the Fund's management and had confidence that most or all of their money would actually be directed to doing the good things they envisioned when they donated.

Table 1. Reasons travelers cite for donating to a philanthropy fund.

- I'll have the satisfaction of knowing that I helped protect a special place (87%)
- I'll know that my \$\$ went to specific concrete projects that I really care about (86%)
- I'll know that my \$\$ made the difference I wanted to make. I'll see the difference. (85%)
- I'll help to protect this place against specific threats (85%)
- The fund will be managed wisely. It is credible and trustworthy (80%)
- I can trust the organization to use my \$\$ the way I intend (80%)
- I'll feel good every time I remember this trip or tell other people about it (73%)
- I'll feel good knowing my trip here has done something good (72%)
- My \$\$ will help not just the environment but also the people who live here (45%)
- There will be monitoring and enforcement of regulations (40%)
- People here will learn to safeguard their own environment (25%)
- I'll get a tax deduction (2%)
- I'll get a voucher towards a future trip (>1%)

Percentages do not add to 100 because respondents could indicate more than one reason.

When travelers were asked about the down side of contributing (that is, the negative consequences that might ensue and their doubts and hesitations about donating), the core of their reticence stemmed mainly from uncertainty about how their money would be used or whether it was needed. (Table 2). According to these findings, prospective donors want to be

confident that their money will go directly to the activities and projects they envision it will support. While they understand that the costs of program administration must be paid (everything from lights and paperclips to board meetings and perhaps even salaries), they demand reassurance that paying the overhead won't gobble up a significant proportion of their donation. In addition, they worry their money could be taken by government or by program managers or even stolen by other people. A fairly large proportion said it was important to know that the country they were visiting (in this case, Ecuador or Mexico) was doing as much as it could to support local conservation and not just relying on the "turistas" to pay for all of it.

Table 2. Doubts travelers cite about donating to a philanthropy fund.

- There will be skimming or tampering by government (76%)
- My \$\$ went to a "black hole"—no way to verify whether it is making a difference (75%)
- My \$\$ will be diluted because of excessive overhead and administrative costs (70%)
- My \$\$ weren't really needed because they already have plenty of money (61%)
- I'll feel like I wasted my money because the country's own government wasn't doing *its* part to support conservation. (50%)
- The threats to nature weren't real or they were exaggerated (42%)
- Corrupt local government officials will steal the money (38%)
- I worry that I'll later feel tricked or duped (15%)
- My \$\$ were redundant because I'm already a member of conservation organization (5%)

Percentages do not add to 100 because respondents could indicate more than one doubt.

Finally, the interviews revealed that normative influences played only a minor role in these travelers' philanthropy decisions (Table 3). Spouses, children, bosses, fellow passengers, and conservation organizations (which are typical sources of normative influence on other types of travelers' decisions) were rarely mentioned when I asked respondents to list "individuals or groups whose opinions matter to you" who would either approve or disapprove of your donating. The most common reply to the "who would approve" question was "Lindblad Expeditions" (owing to the brand loyalty Lindblad enjoys with its guests), but the second most common reply in these two studies was "no one." Notably, while a few guests felt that the opinion of various large

Table 3. Normative influences cited by travelers who are considering donating to a philanthropy fund.

- It is important whether Lindblad Expeditions (or Sven Olof Lindblad personally) encourages me to contribute (55%)
- No one's opinion matters but my own; I know what's right to do (43%)
- It is important whether large credible NGOs like WWF, TNC, CI and Audubon support my contributing to the fund (10%)
- It is important whether my spouse or partner supports my contributing to the fund (1%)

Percentages do not add to 100 because respondents could indicate more than one social referent.

conservation NGOs was a factor in their decision, 90% of them did not. These rather consistent results from the two studies paint a picture of a donor who is not very "other directed" in

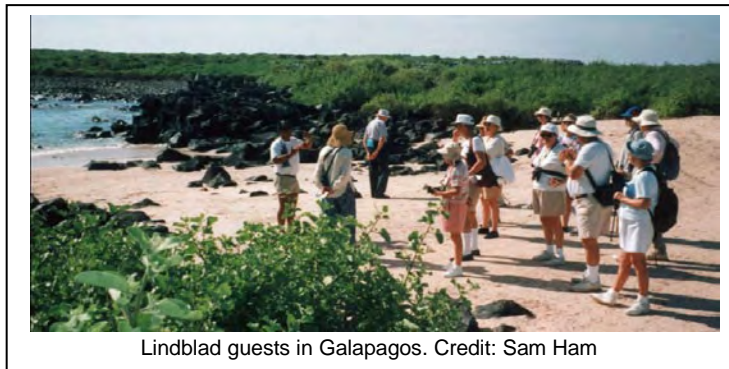
deciding whether to donate, but rather who either feels a self-imposed obligation or who has been inspired by the example of her/his travel company to help. “No one” was the standard reply to the “who would disapprove” question.

- **Tips for Making a More Successful “Offer”**

It is impossible to suggest the actual wording you should use in making your request since the context and interpersonal relationships that you have established with your customers will be the most important factor. In addition, the content and tone of the appeal will differ from case to case because of the variation in the experiences different operators provide their clients. However, if you’ve succeeded in delivering an experience that bonds your customers to the destination, you have prepared them for the offer to act philanthropically. In this scenario, the words you use and the tone you adopt in making your offer will usually come easily to you.

Guides and interpreters play an especially important role in this process since the bond travelers develop—both with the company and the place—is heavily influenced by the character and ethos of their guide.

How guides interpret the setting and interact with their customers, how well they allow the visitors to get to know them personally, and how positively their verbal and non-verbal behavior reflects on the company or organization they represent, can all have a strong determining affect on a traveler’s philanthropic impulse.



Lindblad guests in Galapagos. Credit: Sam Ham

Some operators feel that the travelers’ experience in a destination should be sufficient to inspire a philanthropic act. In other words, they feel that if they’ve provided an outstanding travel experience, they needn’t say anything more to their customers other than letting them know that there is an opportunity to give. In this approach, tourists are simply provided a list of donor organizations that they can choose to give to (or a brochure that describes each organization and the kinds of local projects it supports). The role of the tourists at that point is to decide whether and how much to give to each organization.

I see nothing inherently wrong with this approach, but my experience tells me that greater success comes from more targeted communications, delivered in a more strategic way. As described in the previous pages, Lindblad’s approach was first to identify the reasons their guests would be inclined to give, the reasons they might be reluctant to give, and the social influences their guests might be subject to.

Using this information, a communication strategy was developed in which key messages are delivered to their guests over the course of a seven-day experience, all of which lead to the offer, which is delivered to the guests the next-to-last night of their tour in the form of a simple brochure placed in their cabins.

In addition to the printed materials that guests see while aboard their ships in Galapagos and Baja, the two campaigns also include their materials that guests receive in the mail after

booking their trip and information they can view on Lindblad's website. Lindblad's guides are trained both in the campaign strategy and their special role as deliverers of strategic messages. Toward this end, special training sessions were initially held in each location in which guides and expedition leaders explored ways to interject selected messages into their interpretive commentaries at various times and places during the trip.

This approach proved to be far superior to the more casual approach of just letting the experience speak for itself. In Galapagos for example, the targeted communication strategy nearly quadrupled donations compared to what the Fund was receiving previously.

Whichever approach (the *laissez-faire* or more targeted campaign) seems best suited to your situation, here are five broad guidelines for making more successful offers:

✓ **Timing is important.**

Plan to make your offer *late* in the travel experience and close to the moment in which the opportunity to give actually presents itself. As I outlined at the top of this chapter, your core strategy should be to:

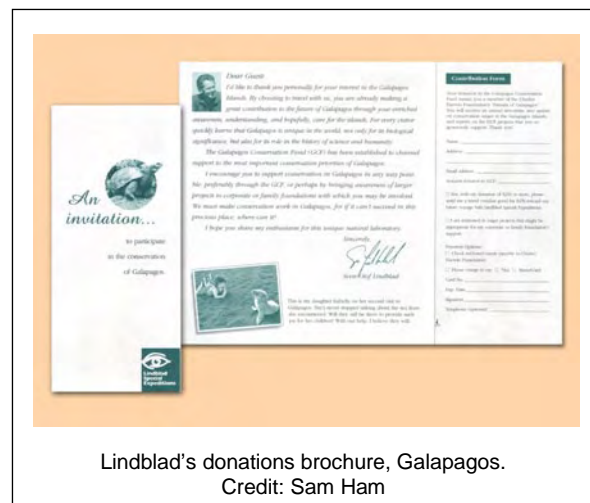
Develop an experiential product that leads travelers to care about the place, and then give them an opportunity in the immediate time frame to act on their caring.

The key words in the second half of this strategy are “in the immediate time frame.” For example, donations would likely not be plentiful if you simply announce at the beginning of your guests’ experience that there will be an opportunity to give and then wait to see what shows up in the donation box when they leave. Your guests will be far more likely to give if elements of their entire experience continuously cultivate their philanthropic impulses. The best results will occur if the offer is made when that impulse exists -- what in psychology we would call a behavioral intention. Making the offer before nurturing the impulse will probably not produce satisfactory results. Likewise, you should not make the offer so late that your guests are now beginning to be preoccupied with thoughts about the return trip, baggage, airport connections, etc. For this reason, **the optimal time to make the offer is probably around 48 hours before your guests leave.**

✓ **Offers appealing mainly to the intrinsic, philanthropic side of travelers will generate more donations than will appeals focused on incentives or external rewards.**

Common sense tells us that someone looking mainly for a tax deduction can easily find charitable organizations close to home. They don't need to travel to far-away places to find them. But even these people are capable of being enticed by the promise of philanthropic happiness.

Therefore, it is important not to overemphasize



tax deductibility or other financial incentives in your appeal. Yes, you need to make sure your customers know whether their contributions will be tax deductible — and for some, deductibility will be a consideration — but tax deductibility is rarely a primary motivating factor. Your appeal must focus on the benefits to the place (including not only the natural environment, but the well-being of people, protection of local cultural integrity, etc.). These are the factors that are almost certainly behind the traveler's motivation to contribute, as the results of Lindblad's philanthropy campaign in Galapagos demonstrate (Table 4).

In the year prior to introducing its more targeted communication campaign, Lindblad offered guests both a tax deduction and the promise of a \$250 voucher for use on any future trip with Lindblad Expeditions in exchange for a contribution of at least that amount. As the table shows, although both incentives (the tax deduction and the voucher) were in place prior to rolling out the new philanthropy campaign, guests' contributions increased sharply the following year when the targeted messages were woven into Lindblad's interpretive program. These results illustrate that a certain background percentage of guests would donate even without the targeted approach, but a very significant increase (more than 270%) ensued when messages appealed more directly to the philanthropic side of guests.

These results should not be taken to mean that offering incentives such as tax deductions and vouchers is unimportant. Obviously, they have a role in travelers' decisions about whether to contribute. What the results show is that such external factors are not likely to be major decision drivers in and of themselves. In other words, fewer donations result if travelers receive offers that emphasize only the financial benefits they will receive by making a contribution. ***The results in Galapagos illustrate the strong impact that appealing to guests' philanthropic side can have on their propensity to give.***

Table 4. Comparison of Galapagos Conservation Fund donations before and after the philanthropy communication campaign.*

Chronology	Tax Deduction Offered?	\$250 Voucher Offered?	Amount of Contributions Received
Year prior to introducing the targeted philanthropy campaign (1997)	Yes	Yes	USD \$1,800 per trip
Year the targeted philanthropy campaign was introduced (1998)	Yes	Yes	USD \$6,700 per trip

*Note: Data for both years are from the same 80-passenger ship (*Polaris*).

✓ **Do offer travelers incentives for contributing.**

Returning to the Galapagos example, Lindblad Expeditions has noticed that the most common donation received since instituting the voucher system is either exactly \$250 or a multiple thereof. This suggests that ***the effect of the voucher has been to establish a psychological anchor for the size of contributions, even though offering the vouchers hasn't appeared to influence greatly the number of guests that contribute.*** Further, Lindblad says that only 29% of the vouchers have been redeemed since the program started in 1997.

So while non-philanthropic appeals might not themselves motivate a lot of travelers to make gifts, they can certainly fill another role. And it is probably safe to assume that for some

travelers who are on the verge of donating, but not yet totally decided, such incentives can make the determining difference. So a balance of sorts is called for. ***You should offer incentives, and you must certainly mention them. But do not make them the core of your appeal. Be sure to link the benefits of making a donation to the positive differences your guests would like to make in the place. Combined with the other incentives you offer, such a campaign probably stands the greatest likelihood of success.***

- ✓ **Prospective donors demand reassurance that their money will actually do the good they envision when they make their donation.**

This reassurance can come in two basic forms. First, guests must have confidence that the majority of the money will go directly to causes that matter to them. If prospective donors believe that a large portion of their gift will be directed to paying overhead, salaries, or other program administration fees, they will be reluctant to donate. If part or all of the overhead is being paid with money from other sources, meaning that donations are not subsidizing these costs, you would be wise to make this very clear. In the case of Lindblad's philanthropy funds in Galapagos and Mexico, overhead (which until recently included board annual) is paid by Lindblad Expeditions. So Lindblad guides can confidently tell their guests that 100% of their donations go to supporting local conservation.

Justifiably or not, travelers tend to mistrust how their money will be handled when they are in a foreign country. And the magnitude of this mistrust seems amplified in developing countries by travelers' perceptions (and yes, sometimes misperceptions) that greedy individuals or corrupt government officials will be lining their own pockets with travelers' donated money. As distasteful as it might seem, you absolutely must address these doubts in order to give prospective donors confidence that the money they give will go to doing the good they envision. Travelers prefer to give to charitable entities that have been approved by their own country's taxing authority to receive tax deductible contributions. This is the second form of reassurance you can provide to help travelers feel comfortable that there is oversight and legal monitoring of the ways in which the money will be spent. For example, the Galapagos Conservation Fund in Ecuador is administered by the Lindblad Expeditions-National Geographic Foundation, which is registered in the United States as a 501c3 charitable organization. Knowing this, Lindblad guests feel confident that their contributions will not be directed to the Ecuadorian government's general budget because the Foundation's books are subject to U.S. federal government accounting and auditing.

Of course, your communication will be most compelling if you can show examples of successful local conservation or humanitarian projects that have been made possible by donations from your previous customers. They, more than anything else you might promise, will give prospective philanthropists the reassurance they need that their contributions will make a tangible difference on the ground.

- ✓ **Apply basic communication principles for philanthropy campaigns.**

The basic considerations that apply to any philanthropic effort also apply to travelers' philanthropy. Any good fundraiser knows to suggest a target amount (if asking for monetary contributions) as Lindblad has done with its voucher system. **But make clear to your guests that any amount large or small is appreciated.** Since these are your customers, you must take care that your communication about the philanthropy program doesn't make them feel "hounded" or "badgered." A good way to avoid this is to clearly state that they are already doing

their part simply by choosing to travel with you, and that the opportunity exists to make a more personal statement (in the form of a contribution) if they so desire.

In Galapagos, for example, guides do not make a formal request for guests to consider donating to the Galapagos Conservation Fund. The Galapagos Conservation Fund (GCF or the Fund) was started by Lindblad Expeditions in 1997 so guests could contribute directly to local conservation projects that preserve the islands for generations to come. Funds contributed by Lindblad guests are directed entirely to local projects across the islands, as determined by an independent board and implemented by the Galapagos National Park and Charles Darwin Research Station. During its first decade, the GCF raised more than \$4.5 million dollars that have been used in a variety of local projects such as the eradication of feral pigs from the island of Santiago and the support of National Park Marine Reserve patrol boats. Today, the fund is called the Lindblad Expeditions/National Geographic Fund for Galapagos and is administered by the National Geographic Foundation in collaboration with Galapagos National Park and Charles Darwin Research Station. (See www.expeditions.com/Travel_Philanthropy502.asp).



Guide in the Galapagos.
Credit: Sam Ham

The Fund is mentioned occasionally by the guides, and sometimes guests ask questions about it (due to their reading about the Fund on the company website or learning about it from another guest), but the formal offer to participate in the program is presented privately to guests in the form of the brochure that is placed in their cabins two days before they disembark. While the strategic messages targeting guests' beliefs about donating are generously integrated into the overall interpretive program during the 7-day expedition, they are rightly focused on interpreting Galapagos (i.e., wildlife, ecology, and history of the islands) and the many threats faced by the archipelago. But mention of the Fund, itself is kept subtle and does not intrude into the experience Lindblad's guests pay to enjoy. In other words, Lindblad's strategy is first to facilitate a bond between its guests and Galapagos, and then to offer the guests an opportunity to act in behalf of a place they care about.

- **Conclusion**

In summary, what might seem like an "ask" is really an "offer" if you have adequately prepared your travelers with an outstanding experience — one that leads them to know about a place, and also leads them to **care** about it. We should not underestimate the importance of this chain of events. As one of the primary messages in Lindblad's Galapagos and Baja California philanthropy campaign materials states:

Ultimately, the governments of the world will be unable by themselves to save the truly special places. It will be the passion and insistence of travelers that will help make this happen.

I hope these guidelines serve to move your philanthropy campaign a step closer to that lofty goal.

Survey of Tour Operators in Arusha, Tanzania

By Johanna Wolff, M.A.

University of Applied Sciences, Eberswalde, Germany

The following is a case study of travelers' philanthropy programs run by tourism companies in Arusha, Tanzania and operating in the Northern Safari Circuit. It is based on three weeks of field work carried out in July 2009 during which the author interviewed 27 tour operators.⁵² The survey was designed to assess how widespread the programs are; the types of projects supported; the motivations of both companies and their guests; how the programs are organized, promoted and managed; and range of donations and the total amount of money collected during one year.

The survey results show that tour operators in the Arusha area are supporting a wide range of social development and environmental conservation activities. The results suggest that the concept of travelers' philanthropy is widely practiced in Tanzania, although it may not be called by this name. Tanzania's poverty combined with its political stability, robust and growing tourism industry and strong emphasis on alternative forms of tourism (responsible tourism, ecotourism, community-based, pro-poor tourism, and voluntourism) make it a logical destination for travelers' philanthropy initiatives.



Village Education Project, Tanzania. Credit: Jane Crouch

• Overview

Tanzania is one of the poorest countries in the world. It is listed by the United Nations as one of the Least Developed Countries (LDC's)⁵³. The UN's Human Development Index, for 2010, ranks Tanzania 148 out of 169 countries.⁵⁴ It is however immensely rich in natural and cultural attractions. Some 25% of the country's territory is set aside in national parks and other protected areas.

Over the last two decades, tourism became Tanzania's most important industry. The main tourist attractions are Serengeti National Park, Ngorongoro Crater, Lake Manyara, Mount Kilimanjaro, and the island of Zanzibar. All of these, except Zanzibar, are located within the Northern Safari Circuit, with the town of Arusha as main jumping off point.

Tourists visiting Tanzania come from Italy (22.9%), UK (18.8%), U.S. (10.1%) and Germany (8.1%). In the Northern Safari Circuit, nearly all tour participants are from Europe and the

⁵² This field research study was part of the author's thesis for a master's degree in Sustainable Tourism Management at the University of Applied Sciences Eberswalde in Germany. It was written in collaboration with the Center for Responsible Travel (CREST).

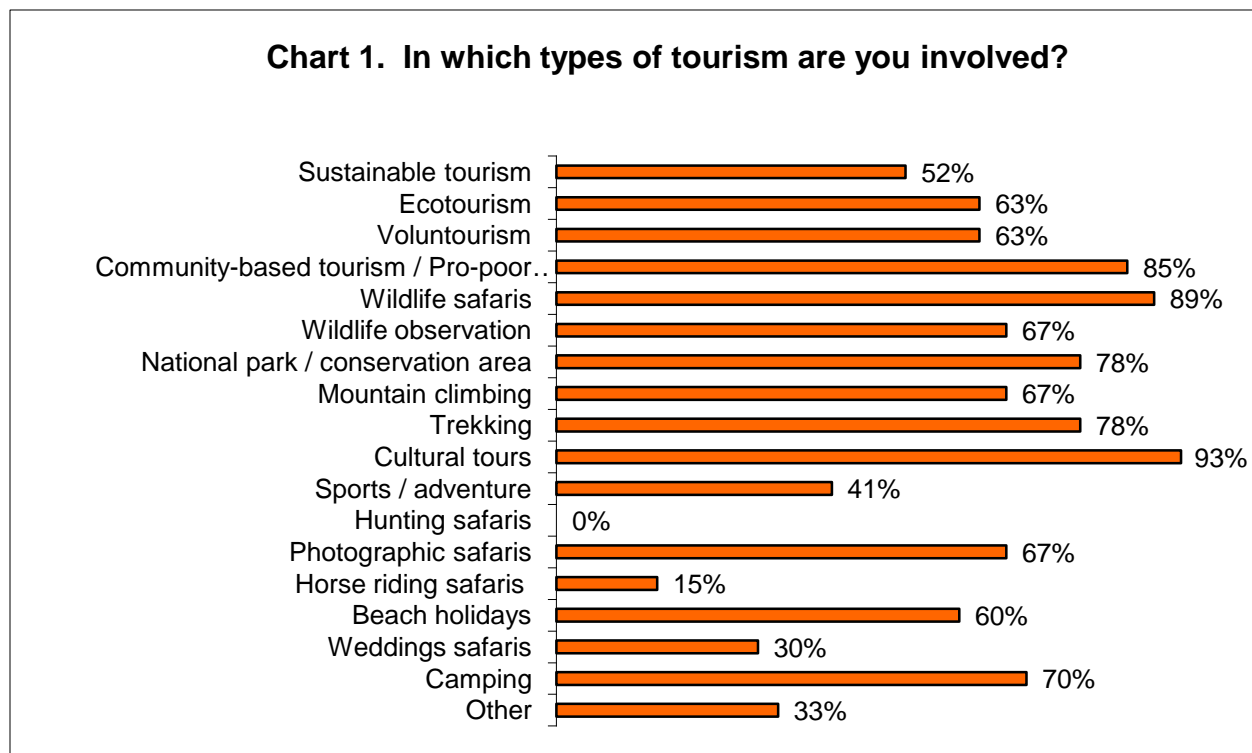
⁵³ "List of Least Developed Countries," http://www.un.org/esa/policy/devplan/profile/ldc_list.pdf.

⁵⁴ Wikipedia, List of countries by Human Development Index, http://en.wikipedia.org/wiki/List_of_countries_by_Human_Development_Index#Complete_list_of_countries.

United States. Tourists stay an average 12 days in Tanzania, with 69% coming on package tours and 31% arriving as individual travelers. Those on package tours spend an average \$155 per night, while individual travellers spend slightly less - \$125 per night.

- **The Travelers' Philanthropy Survey**

There are about 200 licensed tour operators in and around Arusha. At the beginning of this research project, sixty companies involved in travelers' philanthropy were invited to participate in a survey. Of those sixty, twenty seven companies agreed to participate in the survey: twenty one through personal interviews with the author and six via email.⁵⁵



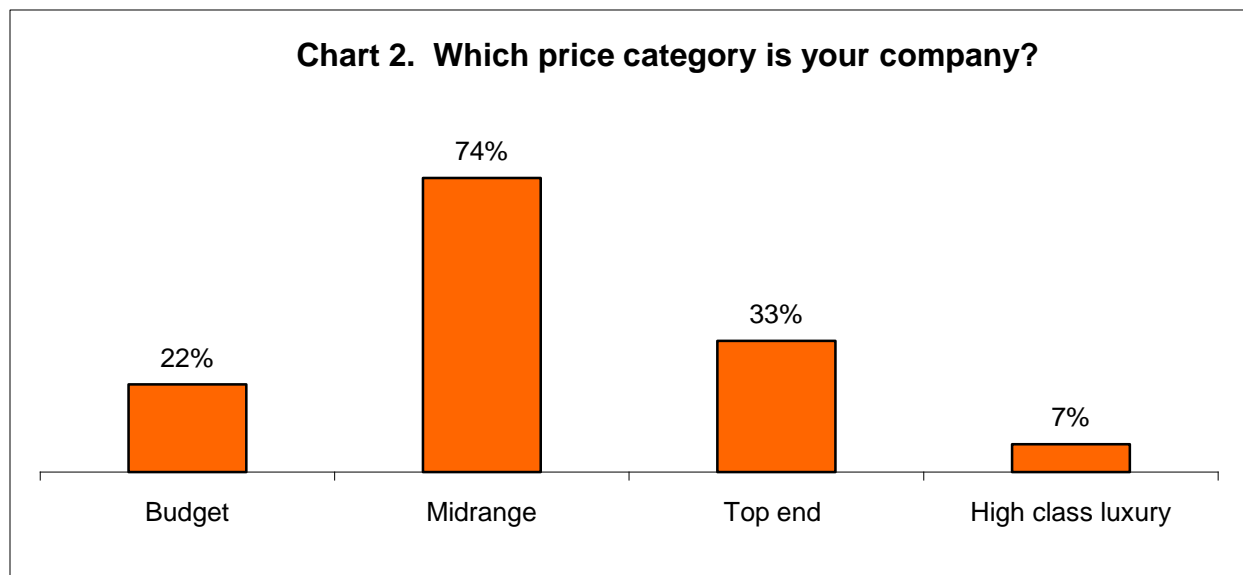
The tour operators surveyed vary widely in their size, having anywhere from 12 to 2500 permanent employees, with between 2 and 70 staff in their Arusha offices. Most are small to medium sized travel companies, with between 10 to 250 company employees. Seventy percent are locally owned and 30% are international companies owned by foreigners or belonging to an international company with a branch office in Arusha. Most of the companies only operate in the Northern Safari Circuit; but some also offer trips to Zanzibar and other areas in Tanzania, a few operate in other African countries (mainly in East Africa), and two operate worldwide.

⁵⁵ The tour companies that participated in the survey are: & Beyond, Abercrombie & Kent, African Environments, Asilia Tanzania, Bush2Beach Safaris, Classic Tours & Safaris, Dorobo Safaris, Duma Explorer, Focus in Africa, Green Footprint Adventures / Wayo Africa, Hoopoe Safaris, J.M. Tours, Jackpot Tours & Safaris, Kibo Tours & Safaris, Kindoroko Tours, Kipepeo Tours, Maasai International Challenge Africa (MICATZ), Massai Wanderings, Nature Discovery, Nomad Tanzania, Roy Safaris, Safari Makers, Serengeti Select Safaris, Summits Africa, Tanganyika Wilderness Camps, Thomson Safaris, Tropical Trails. Thanks to them all!

A majority describe themselves as practicing socially and environmentally responsible tourism, with 85% characterizing their activities as community-based or pro-poor tourism. The main activities these companies offer their clients are wildlife safaris (89%), trekking (78%), and cultural tours (93%).

The companies report that their clients are 56% are European and 44% are from North America, mainly the United States. Companies surveyed handled from 100 to 15,000 guests in Tanzania per year. Collectively, they served nearly 50,000 visitors to Tanzania in 2008.

In terms of cost, the operators were asked to state in which four categories they fit. Nearly three-quarters said they are midrange, while 22% said they offer budget tours, and 40% described themselves as high end or luxury. Several companies said they offer tours in both midrange and high end or luxury categories.



While 70% of the tour companies surveyed said they are familiar with the concept of travelers' philanthropy, 30% said they were not. This shows that even if the participants are actively involved in travel philanthropy initiatives, they may call it something different. Those interviewed offered a variety of definitions of travelers' philanthropy, including:

"Responsible tourism where visitors are actively involved with local communities or projects."

"Doing something good while travelling."

"A client combining travel with donations to local projects."

"Giving something back to communities and nature."

"Guests supporting local community projects by donations."

In addition, tour operators offered a range of motives for establishing their travelers' philanthropy programs. Some said they "want to give back", others said they want to fight poverty, improve education, or help to empower local communities. Quotes from the interviews included:

"We care about communities and conservation."

"It is the responsibility of tour operators and visitors who have enough."

"It's a social obligation as a guest and foreigner in Tanzania."

"We want to support the development of jobs and opportunities."

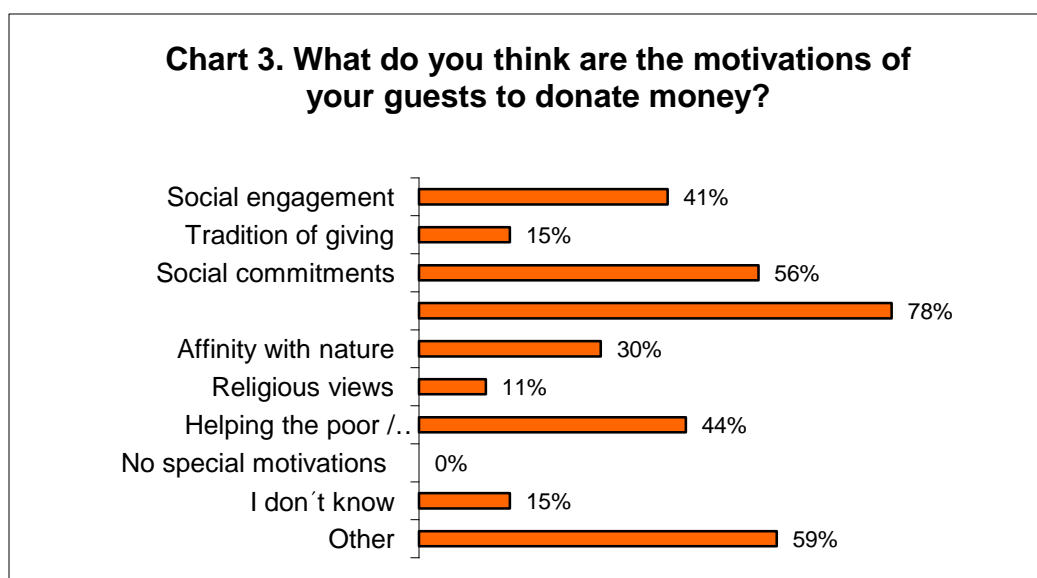
“We want to help provide education to everybody, to make education a human right.”

“People chose us because of what we do.”

“It illustrates our commitment to the country.”

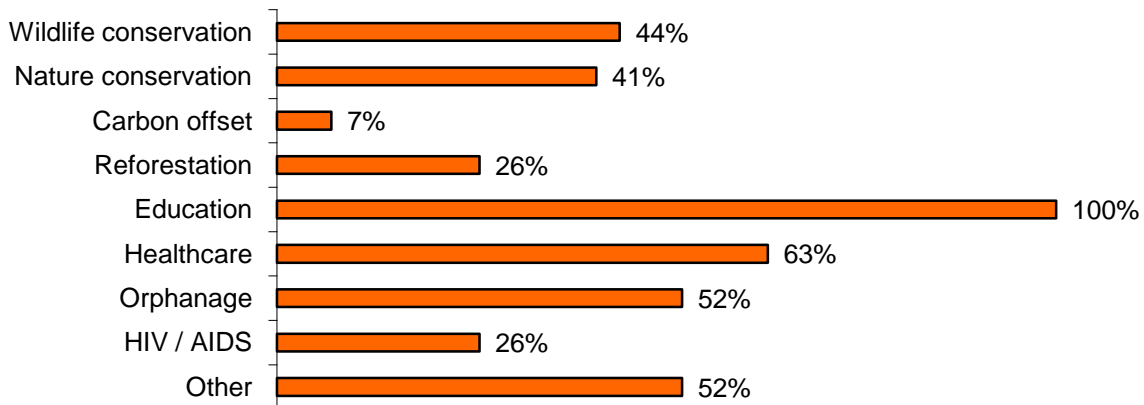
- **Why are Visitors and Companies Involved in Travelers’ Philanthropy?**

Tour operators interviewed indicated that their guests give a range of reasons why they contribute to local projects. These include that want to give something back to communities, want to get socially involved, and they want to help poor people in the country they are visiting. Other motivations are included in the chart below:



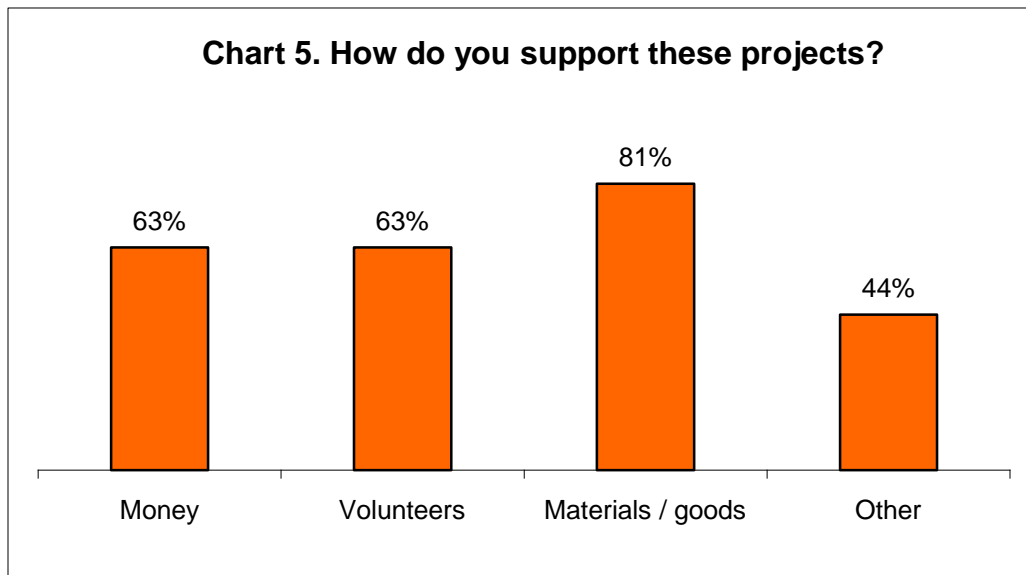
The survey also sought to learn about the types of projects that tour companies and their clients support. Responses indicate that education projects are by far the most prevalent: 100% of the tour operators surveyed said that they are contributing to education. Among the other common responses were; 63% contribute to healthcare, 52% to orphanages, and 44% to wildlife conservation. Those surveyed listed a total of 49 different education projects (schools, kindergartens, and training centers), 18 healthcare projects, and seven nature conservation projects that they are supporting. Many projects have more than one goal – supporting both education and health care, for instance – and some projects are supported by more than one tour operator. In total, the tour operators surveyed listed 74 different projects that they are supporting.

Chart 4. What kinds of projects are you supporting?



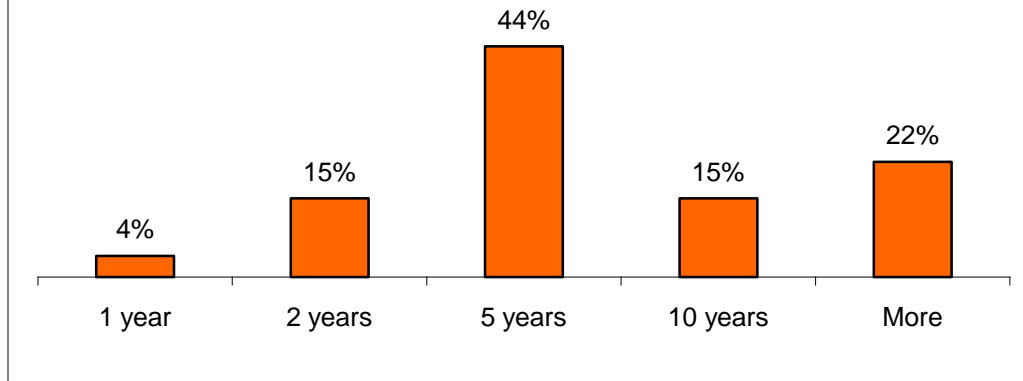
Asked how their company provides support, most respondents (81%) said they donate materials and supplies, while equal percentages – 63% – said they provide money and volunteers. They listed as well a range of other types of support that they provide, including: scholarships to students, staff training, food and accommodations for volunteers, vehicles, and fuel.

Chart 5. How do you support these projects?



Most of the companies have been supporting community and conservation projects for more than five years. This indicates that travelers' philanthropy is a well established component of safari-based tourism in northern Tanzania.

Chart 6. Since when are you supporting local development / conservation projects?



The tour operators interviewed reported that they collected and donated a total of \$688,991 during 2008. The amounts per company varied from \$1,000 and \$163,000. However, this figure is clearly below the actual amount: several companies said that they do not track the donations they receive and give to local projects, while others said that their guests donate directly to the projects. Overall, those surveyed reported that donations provided to local projects come almost equally from guests and from company earnings. Corporate contributions to local projects varied widely, from 2% to, one case, 80% of a company's earnings. Others said that their company contributes what is needed after guest donations in order to complete a particular project.

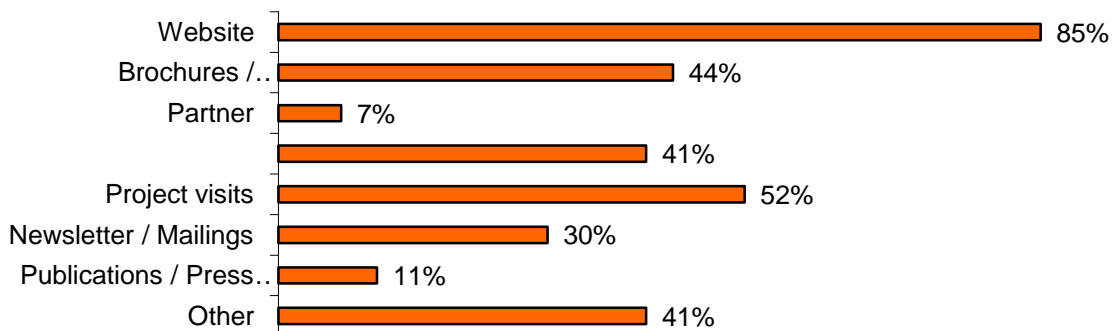
Asked which nationality of guests are most generous in terms of financial donations, 48% of the tour operators surveyed said that those from the U.S. donate the most, while 4% said contributions were spread evenly across nationalities.

In addition, two-thirds of the companies surveyed said that they provide support through volunteers. The number of guests who volunteer ranged from 30 to 300 per company during 2008.

Asked if they support projects directly or through other organizations or NGOs, 81% of the participating tour operators said they support local projects directly and 44% provide support through local or international NGOs or foundations, and some use both methods. In addition, some companies said they have started and run their own projects.

Asked how they inform their guests about the possibility of donating to local projects, most said they use a range of methods: 85% said they give this information on their websites, 52% take their guests for project visits, 44% provide information in their brochures and catalogues, and 41% inform guests on location. Newsletter and mailings are, according to 30% of those surveyed, the best way to inform clients about philanthropic activities. In addition, 41% of the interviewed tour operators said that they use their philanthropic activities as part of their marketing strategy.

Chart 7. How do you inform your guests about the possibility of donating through your company and while travelling with you?



- **Observations and Issues**

Survey respondents recognize that there have been numerous positive tourism-generated philanthropic activities in the Northern Safari Circuit in Tanzania. They believe that tourists and tour operators feel a sense of responsibility for the well-being of both the local people and nature. In general, the businesses and their clients see tourism and travelers' philanthropy as mechanisms for improving residents' quality of life. Individuals interviewed said things like:

"A lot of very good work is going on but it's mostly unrecognized."

"There's been a growth of both philanthropic activities and ecotourism in this area."

"There's high potential in Tanzania as there are many different types of tourists. The luxury travelers tend to donate while the backpackers volunteer."

"There have been a number of good projects implemented from generous donations by travelers and these have made a difference to the local recipients."

On the other hand, the survey participants pointed out a number of problems associated with travelers' philanthropy activities in the Arusha area. Many perceive that there are too many organizations, projects, and individuals involved in collecting and distributing money, materials, and manpower in the area. Everything is done in an ad hoc manner without guidance from surveys, analyses, or communication among the myriad of donors. Without any coordination, or even organized dialogue, among the tour companies, there is no shared method for evaluating beneficiary organizations or projects. They described the present type of philanthropy as rather patronizing and not helping the communities to feel responsible or empowered.

In addition, due in part to the lack of evaluation and systematic oversight, respondents believe that some donations may be mismanaged. Project leadership is often unsophisticated, with disorganized (if any) records, meaning that donations are not properly tracked and may fail to reach their intended recipients. Even when the recipients get the full amount of the donation, people involved in implementing a project have been known to embezzle donated monies or channel them into dishonest and corrupt local businesses.

Those surveyed also criticized volunteer programs, saying that although there are many volunteers, they help relatively little. They said that often volunteers are more interested in gaining experience for themselves rather than helping to bring long-term benefits for the local organization or community. Furthermore, they said, the volunteers often do jobs that could be easily done by local people who could get hired and paid for their work. Because volunteers typically pay to volunteer, the volunteer market has developed into an economic sector with a lot of competition between the different organizations and programs.

Comments from those interviewed included:

“There are too many different organizations.”

“Volunteer programmes cost a lot and do not benefit the communities.”

“Money does not reach the people in real need.”

“Dependence on foreigners to develop.”

“Money disappears in bureaucracy.”

“It’s totally unorganized and badly managed. There’s no combined effort.”

“If not managed well, donations can create continuous dependency.”

“The current practices of philanthropy are more patronizing than empowering.”

- **Recommendations**

Those interviewed said that travelers’ philanthropy initiatives are already quite widespread in the Arusha area. However, they said that they believe that every tour operator should become actively involved in contributing to social service and conservation projects. The phenomenon of travelers and tourism business donating money, time, or talent to address pressing local needs has tremendous potential to assist developing countries and their poorest regions.

Survey participants went on to make a number of suggestions and recommendations for how to improve travelers’ philanthropy practices and operations in the Arusha area; many of these observations are applicable to other destinations.

A number of those interviewed said that it would be helpful to build up a joint initiative among tour operators and the local organizations and communities. They recommended that tour operators create an umbrella organization, a “Tour Operators Initiative for Philanthropy,” that would pool efforts, set targets and goals, and make sure that local projects receive the support they need. They suggested that it would be better if companies supported collectively existing local organizations rather than creating new projects.

In addition, respondents recommend long term philanthropic investments, geared towards helping communities to help themselves become more sustainable and independent. Tour companies recognize that communities need to identify their own needs and priorities. In addition, they recognize that philanthropic activities managed by skilled and qualified employees are likely to be more strategic and accountable. Donations should be directed to the communities and causes with the greatest need, but always through responsible persons or organizations. Transparency must be guaranteed and projects and donation processes must be evaluated. They added that communities as well as tourists must be taught about both the positive and the negative impacts that donations can have.

Those surveyed also said that volunteer programs must be improved so that it is clear what volunteers can do and how they can help. Volunteers should be required to bring special skills and training abilities and should not be used as cheap labor. They should share their knowledge and never take jobs away from locals or do work the local residents could do.

Further, they said that the government needs to learn more about and provide more support, incentives, and oversight for these philanthropic endeavors by tour operators. Many of those surveyed complained that the government pays no attention to the current philanthropic activities, has no concept of what philanthropy actually is, and is suspicious that it is somehow a secret source of income for tour operators. Several said they believe it would be appropriate for the government to require travel companies to support community and conservation projects through a portion of their corporate earnings.

Finally, those interviewed noted that at present most of the projects receiving support are clustered around Arusha. In fact, travelers' philanthropy contributions should be used to support projects throughout all of Tanzania, including Zanzibar.

Quotes from the interviews on the topic of recommendations:

"Transparency."

"Monitoring of expenditure."

"Change from ad hoc unstructured help on request to long term commitments."

"Provide something that is not available, e.g. training, skills. Always take local workers if possible."

"Voluntourism should bring real benefits, not only as experience for the volunteer."

"One joint initiative of tour operators in the area to manage the donations and evaluate the effectiveness of projects."

"Create a joint initiative, a so-called Tour Operators Initiative on Philanthropy."

"The management of the money and the evaluation of the projects must be improved."

"Build empowerment through philanthropy that is in it for long term and dealing with root issues of justice and sustainability."

"Formulate policies which will encourage all tourism stake holders or operators to spend apart of their earnings on social development."

Transferring the successes and lessons learned from the Arusha area to other travel destinations seems possible. However, this case study will be most applicable in places where the current conditions are generally similar to those in Tanzania's Northern Safari Circuit. For starters, there must be a core group tour operators motivated to support local projects and organizations. There must be a local community or communities that can identify which projects are priorities and can work with the tourism businesses to establish transparent, accountable, long-term operating systems. It also appears that travelers' philanthropy is most likely to succeed in destinations with significant levels of alternative forms of tourism (ecotourism, community-based tourism, pro-poor tourism, etc), together with stable political systems and safe conditions for visitors. Ideally, there would be an existing and mutually beneficial relationship between tourism businesses and the host communities in order to provide the most solid launching point for a new travelers' philanthropy program.

Readiness Check List for Businesses

By Judy Kepher-Gona
Chief Executive Officer, Basecamp Foundation

- **Step 1- Knowledge of the Area**

The first step towards having a travelers' philanthropy program is to have thorough socio-economic, cultural and environmental knowledge of the area. It takes years of engagement in and positive interaction with host communities to know an area. Mistakes are made when operators accept support from guests towards perceived needs of the community, based on observations from a two-day safari. If an operator is not informed and ready, they should decline such offers or channel them through agencies that offer support in identifying viable projects.

- **Step 2- Demonstrate Good Leadership**

Good leadership is achieved through positive interactions with community and other stakeholders. It requires transparent relationships, an objective approach to matters of concern to community, open expression of both intentions and views on matters of interest, respect for local cultures and learning with the community, and a commitment to promoting equity and good governance. Providing good leadership creates, builds, nurtures, and sustains trust. As you get to know an area where your company wants to work, provide a chance for the community to know and appreciate your business and its approach to community engagement. Engage and win the trust of the community through activities such as annual 'community days' where you give community members an account of the business' performance. Enter into long term partnership agreements to communicate your commitment and mentor community champions to demonstrate your desire for local leadership to prosper.



Tibetan Children's Village, Dharamsala, India.
Credit: Stefan Norris

- **Step 3 – Invest in Corporate Social Responsibility (CSR) Projects**

Test your business' readiness and its relationship with the community through a few selected CSR projects. This serves two purposes. First it demonstrates the commitment of your business as a social investor. Second it provides opportunity to gauge local leadership and investigate cultural dynamics that may not have been obvious through your prior interactions. The CSR projects should be low investment, short-term projects with tangible outcomes. Engage the community in planning these projects and allow residents to make contributions in cash or in

kind. This process exposes the community to practical aspects of planning and governance. Ensure management teams are inclusive, incorporating women and youth. Examples of CSR pilot projects could include constructing fences, building a classroom or a toilet, painting classrooms, or providing school supplies.

- **Step 4 - Assessment of the Area**

Undertake an assessment of the area to understand needs so that any projects that are undertaken will be need-driven and not donor-driven. The assessment can be done through workshops or expert studies but the key is to have community participation. The outcome of the assessment should be a 'community voicing report' where aspirations and expectations of the community are captured. This report should be used by the business to identify potential projects suitable for support through travelers' philanthropy. The report will also help to identify other people already working in the area. This is necessary to avoid conflicts, competition, and duplication of efforts.

- **Step 5- Scanning Potential Projects**

Identify individuals,, groups, or institutions that may have an interest in selected projects that you have identified through your assessment Engage in a dialogue with these stakeholders so that you can begin to understand their expectations, and the roles and contributions they may offer. Through these consultations, scan the project for sustainability, level of impact, community participation, and level of transformation. Overall it has to be SMART: Specific, Measurable, Attainable, Relevant and Time bound. The scanning exercise should result in a written report covering each proposed project. These documents don't need to be long but should cover all the aspects of your SMART scan.

- **Step 6 - Develop Agreements**

It is important to have written agreements (in the language or languages understood by the parties involved) that will govern implementation of the project. Depending on the nature of the project, these may range from simple statements to complex memoranda of understanding (MOUs). These agreements also reinforce commitment from the parties that are involved (the business, the local organizations, and/or community leaders) and define relationships.



- **Step 7- Design a Travelers' Philanthropy Program**

When designing a travelers' philanthropy program, you should build on the consultations, project documents, and agreements designed above. Remember that travelers' philanthropy projects must be grounded both in community and company plans.

These documents should also be used to develop materials to communicate about a project to travelers and assure them that the project is well-conceived and executed. The program must

not infringe on travelers' holiday time. It should be voluntary, allowing guests to choose whether or not they want to be involved. The way the information is shared is important. The most commonly used sharing methods are; briefings, information leaflets in the traveler's room, reports in the lounge tables, banners and presentations. Presentations should be made to travelers who have shown interest in learning more about the program and requested an in-depth briefing. Remember your travelers are first and foremost on holiday and must never be made to feel guilty about this!

NOTES:

- The greatest responsibility for a travelers' philanthropy program (including donations and how they are used) lies with the business or travel company whose guests support the project.
- On-going consultations with all parties involved to manage expectations, build consensus, ownership, support.
- Keeping proper account books is a must. It is most important is to show audited accounts of the project to all partners and supporters.
- Third party evaluation of the project's performance and finances should be regularly undertaken. The third party can be agreed upon by the business and community leaders or local organization.

Chapter 5:

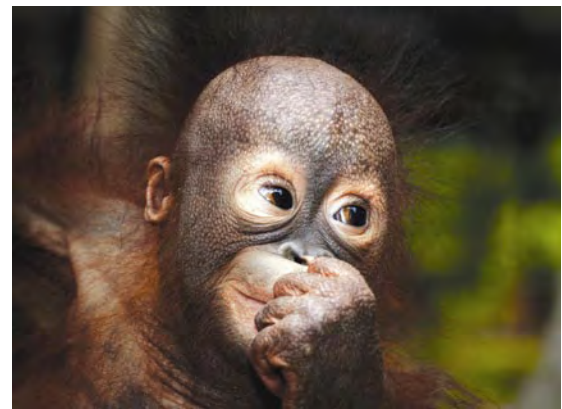
Engaging Communities and Local Organizations in Travelers' Philanthropy

How to Manage Interaction with Community Projects

By Jane Crouch
Responsible Travel Manager, Intrepid Travel

A travelers' philanthropy program can bring both needed support to a community and provide benefits for the travel company and the traveler. It may present some great opportunities for engaging and educating company staff and travelers about a country's issues and challenges, and positive solutions. At a minimum, there can be marketing upsides when a company describes the projects it is supporting in its brochure and on its website. More broadly, when a travelers' philanthropy program is done well it can have profound impacts on all the participants. Travelers' visits to and experience with community projects can have the power to engage, inspire, educate, and motivate them to understand issues and inequities that they would not otherwise be exposed to. As a result, travelers may be moved to support the project, or become an advocate for the cause, which enriches their whole travel experience.

A meaningful project visit may also inspire travelers to consider how they could live more sustainably and thoughtfully, and encourage them to more carefully consider their purchasing decisions. For example, a visit to an orangutan sanctuary in Borneo motivated some travelers to try to avoid purchasing products containing palm oil because they learned that palm oil plantations result in deforestation and loss of habitat which impact orangutan survival. Similarly, when travelers observe people learning the skills needed to make high quality handicrafts they understand the importance of purchasing 'fair trade' products instead of buying mass-produced items. In essence, travelers' philanthropy, and project visits in particular, can help travelers to “think globally, and act locally.”



Sepilok orangutans, Borneo.
Credit: Dale Neil. Photo courtesy of Intrepid Travel.

Project visits can lead to greater and more informed giving to causes, because poverty and deprivation now have real faces. Previously a traveler may have read about the issues with a degree of detachment because the victims were distant and unidentifiable. Visits may raise consciousness and motivate travelers to reach out and share their greater wealth and opportunity with those who are less fortunate. Seeing an effective local organization in action,

the traveler is given hope, empowerment, and practical evidence that contributions can truly make a difference.

- **How can Companies inform Travelers about their Travelers' Philanthropy Projects?**

- In company brochures
- Their website, possibly with links to the partner organization or project's web-site.
- Newsletters - preferably electronic to reduce paper waste and ensure immediacy.
- An information sheet, flyer or pamphlet sent in advance of their trip or provided upon arrival, or detailed in the trip dossier or notes which are provided upon booking.
- Blogs - regular updates from staff, volunteers, or visitors at the project.
- As part of a company's Responsible Travel or Sustainability reporting. Note that philanthropic support should be one component of a company's sustainability reporting, and not held up as a dominant activity. Statements that imply "The company gives to charity so they must be OK" can provoke cynicism and raise questions about the ethics of how the company operates and cares for its' stakeholders and communities.
- Featuring projects on travelers' philanthropy websites. For example:
Travelers' Philanthropy: <http://www.travelersphilanthropy.org/index.html>
Travel Pledge: <http://travelpledge.org/>

- **How Should Project Visits be Handled?**

Visiting a travelers' philanthropy project should be a positive experience for all parties. But to make it so requires both planning and sensitivity to the needs and capacity of the community where the project is located. There should be a local employee or representative present to welcome visitors and describe their work (possibly with the guide or group leader translating). There should be some activity in progress or some displays representing their work. It is important to offer an alternative activity or location for travelers who do not want to participate in the site visit.



The visit should not feel 'voyeuristic' or uncomfortable for either the visitors or the locals. Some projects by their nature are not appropriate to visit. These may include:

- A clinic - patients dealing with reproductive health, family planning, victims of violence, HIV/AIDS or other serious health issues naturally want privacy.
- A school when classes are underway - unless pre-arranged.
- A project related to disease management - human or animal, where visitors may introduce germs or spread germs after their visit.
- An orphanage or other institution involved in child welfare – unless pre-arranged and well-managed (please note further points below under 'Important considerations for caring for children')

Timing and frequency of visits must be negotiated and pre-arranged to avoid disrupting the recipient organization's key activities and to allow for coordinated, well-staffed presentations.

An organization may, for example, only have the capacity to host a visit from travelers once a fortnight, or even less frequently.

- **Should Host Projects receive Remuneration for receiving Visitors?**

Unless a tour company or particular visitors are making very large donations, it is certainly fair for the company to cover the cost of staff time and resources (brochures, refreshments, etc.) that the local program or project used to prepare for the visit. This compensation might be a fixed amount per head – say, \$10 per person -- or a lump sum per group visit. This should be negotiated beforehand between the project's leader and the company representative. Unless a travel company is raising large sums of money for an organization's work, the company should pay all costs associated with a project visit that is part of an itinerary and contributes to the travelers' holiday experience.

- **Important Considerations for Caring for Children**

Additional considerations must be addressed for visits to child welfare projects. Recent attention to popular media personalities who have adopted children from poor countries has caused an increasing number of travelers wanting to visit orphanages and similar institutions in hopes of helping the children in some way or to simply 'put a smile' on their faces.

Despite traveler demand, such visits must always be pre-arranged and the tour company should conscientiously consider the following precautions:

- Short term visitation to such organizations can be disruptive and exploitive of the children, without producing any beneficial outcomes. An orphanage is a child's home, a place that should be safe and should respect his/her right to privacy and dignity. Regular tour group visits may turn their home into a zoo-like experience.
- Visits can arouse pity in travelers who want to help in some way, leading to inappropriate 'band-aid' type assistance or handouts (of candy, pens, clothing), rather than sustained and truly beneficial support.
- The institution and the travel company must be prepared to tell travelers the best ways to help the children.
- Appropriate supervision and oversight of children can only be provided through planned visits. We must be aware there is a risk of introducing children to adults who may have sexual or other exploitation in mind.
- Brief visits by foreigners can encourage a culture of dependency and teach children that smiling and looking cute will bring them or their organization gifts and money.
- Short-term volunteer postings are generally not advised where children are involved, especially vulnerable groups such as orphans and children with disabilities. Children need stability. There can be negative emotional and psychological effects with rotating short term care and interaction.



- Volunteers who work with children need either to be monitored at all times or have had background or reference checks completed before they begin work. It may be difficult to arrange for this degree of oversight, especially in remote locations.
- Local staff may not be aware of the risks, but tour companies must be. Although most visitors are well meaning and driven by a desire to help, the cumulative effect of brief visits by many foreigners can be detrimental to the children's long-term interests.

- **Sensitivity when Visiting Projects in Remote or Ethnic Minority Communities**

Extra sensitivity and planning are important when visiting projects in remote or ethnic minority communities:

- Members of the community should be directly involved in the development and operation of projects and project visits. They should actively participate in day-to-day management and decision-making around the visits and not just be passive employees.
- Local people should be given the opportunity to present their work or their project in their own way to visitors. This could be through talks, village walks, hands-on demonstrations, or other activities. The group leader or guide may need to act as a translator.
- Activities should provide opportunities for meaningful interaction between the travelers and local people.
- Local men and women should be given equal opportunity to be actively involved.
- The guide or group leader should brief the group on what to expect and on appropriate behavior before they arrive in the community. This includes advising the visitors about suitable dress, taking photos, and respecting privacy.



Home village weaving cooperative, Timor-Leste.
Credit: Jane Crouch

- **When Travelers feel a Call to Action....**

Travelers are often seeking ways to make a difference in the world. Sometimes they are just waiting to be asked or shown how. Offer this information at what feels like the right time before, during, or after a visit. Experience will soon help you to determine when is most appropriate. Options include:

- Opportunities to purchase goods or services at the project, during the visit;
- A mechanism for travelers to make a monetary donation to the project during their visit;
- Instructions given to the travelers during the visit on how to make a donation later;
- Follow up communication emailed or sent by regular mail to request support after the trip is over;
- Directions on how the traveler can organize a fund-raising activity to benefit the project after returning home.

Explain to travelers how their donation will be used, with some practical and tangible examples. For example, \$25 will fund one cataract operation and restore a persons' sight; \$10 will pay for one school desk, made by the local carpenter; \$50 will buy enough reading materials to supply an entire school class.

It may be preferable for a tour company to offer a system by which travelers can make secure donations after the project visit, rather than having travelers leave small amounts at the project. These on-the-spot donations can be frittered away on day-to-day needs, rather than accumulated towards a bigger goal. Companies may wish to offer an incentive to travelers to donate via their travelers' philanthropy program. For example, The Intrepid Foundation, the travelers' philanthropy initiative of the small-group adventure operator, Intrepid Travel, matches travelers' donations dollar for dollar -- up to AU\$5,000 per donor and a total of AU\$400,000 for all donations received in each financial year (at time of print).

- **Conclusion**

Travel companies make a difference in the world, and especially in the places they visit, by engaging staff and clients in travelers' philanthropy activities. Philanthropy can enrich the lives of travelers, company employees, and company owners while fostering more support for communities in great need. Aim high, but be realistic and avoid committing beyond your personal or corporate capacity. And always keep this one rule in mind - do what is in the best long-term interests of the beneficiary communities.

Survey of Recipient Organizations in Arusha, Tanzania

By Jessie Davie
Independent Consultant, Arusha, Tanzania

• Introduction

Whether they are high-end tourists or backpackers, many travelers who are visiting northern Tanzania today, specifically the Arusha Region, are engaging in philanthropic activities that compliment their travels. Arusha serves as the jumping off point to Tanzania's famed northern game circuit including the Serengeti, Ngorongoro Crater, and Mt. Kilimanjaro, among other world class attractions. Many tour operators based in Arusha are promoting certain community projects or organizations by arranging for tourist visits to project sites, providing visitors with information, and collecting donations. Some travel companies have begun specializing in placing travelers with an interest in volunteering at specific projects. In addition, some nonprofit organizations directly promote traveler involvement by welcoming tourists to their sites, providing volunteer opportunities, and using their websites to educate and attract travelers. In total, these efforts by tour companies and travelers to assist local organizations in addressing some of northern Tanzania's pressing social and conservation needs constitute a robust example of travelers' philanthropy.

The case study by Johanna Wolff ("Survey of Tour Operators in Arusha, Tanzania" in Chapter 4) based on surveys with 27 tour operators, demonstrates that many tourism businesses in the Arusha area have travelers' philanthropy programs. However, the importance of these programs and their impact on the recipient organizations was not clear. Therefore, in early 2010 the Center for Responsible Travel (CREST) commissioned this study to assess the actual benefits generated by travelers' philanthropy in Arusha and to assess how visitors' donations could be utilized most effectively. Eleven organizations were surveyed, all of which are working with tour companies to receive donations, material goods, and/or volunteers. These included schools and other learning centers, orphanages, and human and land rights organizations.

All the organizations surveyed view this financial assistance as positive and vital to the running of their organizations. In addition, some organizations rely on tourists to become volunteers or to bring needed materials and supplies from their home countries to a project site. This survey provides, for the first time, information about the range and level of gifts received from philanthropically-oriented travelers to northern Tanzania and, how travelers get involved in supporting local organizations and causes. It suggests that certain types of donations more effectively support the work of local organizations' work, while other types are less useful. Taken together, the results of this study offer important guidance for organizations accepting travelers' philanthropy.



Tourists sharing lunch with students, Arusha, Tanzania.
Credit: The School of St. Jude

- **What's Being Donated and its Importance**

The surveys found that local organizations become recipients of travelers' philanthropy in a number of ways. Regardless of how the connection is made, as the relationship between a tourism business and a local organization is being developed, the organization should, ideally, indicate what types of donations they most need. For a variety of reasons, survey respondents indicated that they had not been clear about their organization's needs. Those surveyed said that in some instances, the tour companies or travelers simply inform the organization of the type of donation they will make. In this case, it is usually a financial contribution that is collected by a tour company and then given to the organization. For example, a respondent from one organization explained, "When clients book with the [tour] company, they are usually asked to make a voluntary financial contribution or bring educational materials."



Daycare center, Arusha, Tanzania.
Credit: Faraja Young Women Development Unit

In some cases, the organizations themselves make specific "asks" to travelers -- an amount of money, type of goods, or kind of volunteer project. Especially in cases of volunteers, the organization and the individual or company work together to determine that the proposed project suits both the volunteers' skills or the needs of the organization. As one respondent explained, "Volunteers are allowed to contribute ideas [to our organization] and decide how they want to help or use their donated money." Another organization said, "[Our volunteers] teach at the school, design curriculum, provide technical support, whatever is needed at the time and is something they would like to do."

Although there is no fixed method for determining the type of contributions an organization will accept, those interviewed indicated that the more control the organization has over incoming support, the better. In fact, three organizations have actually developed guidelines to direct travelers' philanthropy—e.g. what kinds of goods will be accepted, how much money a visitor must contribute on site, and rules regarding volunteer activities. In general, philanthropy comes in the form of money, goods and materials, or volunteer time. Below are some recommendations for each type of donation.

- **Money**

All those surveyed – 100% -- said that financial support from travelers is either "extremely important" or "important" to their organization. Three of the organizations were either founded or co-founded by safari companies as a mechanism to channel guests' gifts to good local projects. These three continue to rely on significant annual financial support from the founding companies and their guests.

Many of the beneficiary organizations said that because they are constantly struggling to meet their budgets, cash donations are seen as the most valuable type of gift. As one respondent explained, "If you have money you can buy what you need." Another stated, "Funding is best, as we can source materials here. Funds are needed for the building projects, teachers' salaries, and secondary school fees, etc." Although all the organizations surveyed receive funding from

sources beyond tourism, in many cases, travelers' contributions lead to additional or ongoing donations, either from the same traveler or from the traveler's personal network of family, friends, and colleagues. This increases local organizations' interest in working with tour operators to set up travelers' philanthropy initiatives. Those surveyed also noted that travelers are more willing to contribute if they have confidence in the tour operator and know that the operator has a long-standing relationship with a particular organization.

- ***Goods and Materials***

While all the eleven organizations surveyed accept material goods, six said that donated goods and materials “are not important to their operations.” Almost all goods and materials needed by these organizations can be purchased locally. As one respondent stated, “Everything we need [for our organization] we can purchase locally, provided we have the funds to do so.” Buying materials locally has the added benefit of supporting the local economy and employment. Another interviewee noted, “There are rare cases when the provision of material support is more practical than simply providing financial resources.”

Several said that they find it very helpful when travelers ask what kinds of items would be useful to the organization. They listed computer materials as among the useful items. One organization has developed a “wish list” to help travelers in bringing donated goods and materials that will be genuinely useful. (See below the “What Can I Send?” list from the School of St. Jude) As the respondent explained, “Randomly donated cheap and inappropriate goods just become landfill or clutter up much-needed storage space. Also, unsolicited items from overseas can cost the charity unanticipated expenses in the form of import duties and other taxes, handling and shipping charges, etc.”

Two respondents said that goods and materials were “extremely important,” but in both cases these supplies were being donated by volunteers who knew what kind of materials were useful. For example, one of those surveyed said that it is useful if volunteers donate their labor as well as construction materials needed to repair classrooms.



The clear message from this portion of the survey is that travelers should not donate goods or materials unless the recipient organization has specifically requested the items. Tour companies and travelers should inquire in advance about current needs and ask if the organization has created a “wish list.”

- ***Volunteers***

Respondents for six of the eleven organizations surveyed said that volunteer support is “important” or “extremely important.” Each organization has a different method of recruiting and engaging volunteers. Some tour operators organize volunteer activities for their clients, while some travelers use a volunteer placement agency and some of the local organizations recruit volunteers themselves. Volunteers come from range of countries — the U.S. being the most common — and the length of stay ranges anywhere from one week to two years. None of the

participants said they charge volunteer fees, although some did specifically mention that they expect volunteers to cover their own expenses. Most respondents said that volunteers typically donate funds or material goods after they have completed their service.

Two of the organizations surveyed said that they rely heavily on volunteers. One explained, “There would be no English, math, or computer teachers without volunteers.” Others find volunteer support important when it is aligned with the organization’s needs. For example, one respondent explained, “Support from highly skilled, qualified, and experienced experts in finance, strategic planning, marketing, IT, and education is vital.” However, while acknowledging the benefits, one organization cautioned, “Volunteer support can sometimes be burdensome for the organization. The organization must use financial, human, and time resources to adequately host volunteers.”

Several organizations noted that volunteers bring an added benefit that goes beyond their direct assistance. As one put it, “Teaming up volunteers with Tanzanian staff often fosters shared learning experiences. For the volunteers, they have a chance to learn about local culture and livelihoods, and most importantly, to challenge their existing misconceptions and prejudices.



For the Tanzanian staff, they gain exposure to different ways of approaching problems, conducting activities, and managing programs.”

Survey participants noted a range of other benefits. Volunteers tend to donate funds, materials, and goods before or during their volunteer experience. By dedicating their time and energy to a project, volunteers gain a sense of ownership and commitment to their organization. After they finish as volunteers, they are likely to continue to make donations and assist the organization. As one respondent explained, “One volunteer now donates \$100 every month to us, because she valued her experience so much.”

- **How do Travelers Learn about Local Organizations?**

There are many ways for travelers to learn about civic organizations and projects in northern Tanzania. Tour operators often build information about local organizations, including site visits, into their tours. Some organizations have websites that promote their work and invite travelers to visit their projects. Increasingly, travel guides such as *Lonely Planet* (which was specifically mentioned by one recipient) list local organizations, thereby helping to draw tourist attention to them. In addition, travelers who have visited in the past tend to share their experiences and stories with future travelers, thus spreading the word about these organizations’ work.

- **Importance of Site Visits**

Survey respondents rated site visits as the most effective method of introducing travelers to their project or organization. One respondent explained, “Their gift at the time of their visit is important, but the most valuable thing is when they go home and spread awareness, raise funds [for our organization], and continue to contribute regularly themselves.” Those interviewed

confirmed that visiting the project, understanding the issues, and seeing first-hand the organization's work is a powerful experience for many travelers and it often leads to a long-term relationship with an organization.

The majority of the organizations surveyed said that financial donations increase after a site visit. Some organizations find these visits so worthwhile that they have employed additional staff to arrange and organize them. As one explained: "Our school now employs several extra staff members to ensure visitors receive worthwhile experiences and tour companies receive good service from us. But this is worth it. All visitors are welcome, provided that they have little or no impact on the daily schedule and education of our students. We recognize the importance of spreading knowledge about our school."

However, some organizations complained that they receive either too few or too many visits from travelers. One respondent said that because of the organization is in a remote location, it has trouble attracting travelers for onsite visits and this hurts its ability to raise contributions. Another more centrally located organization, Rift Valley Children's Village, found the number of visitors became too overwhelming so it has now developed a set of guidelines to help streamline visits and make them more worthwhile for the organization in terms of income and staff time. (See Rift Valley Children's Village (RVCV) Visitor Policy) As the person interviewed explained, "The number of people asking to visit has grown to a point where it is becoming unmanageable and potentially detrimental to our work." Respondents explained that visitors must be sensitive to the project's overall goals and that their visits should not get in the way of the day-to-day functioning of the project.

Overall, those interviewed said that traveler visits to local projects are incredibly meaningful and have long-lasting benefits for both the visitor and host organizations. As a general rule, it is incumbent on travelers and tour companies to ensure that their site visits are conducted in a respectful way and abides by any guidelines created by the sponsoring organization.

- **Conclusion**

As travelers' philanthropy continues to grow in northern Tanzania, it is important to understand the value and benefits that local organizations say they can derive from this type of development assistance. Those surveyed made clear that not all types of support are beneficial. They stressed that the host organization needs to specify the types of financial, material, and volunteer donations are most useful. In turn, tourism businesses and travelers who are truly interested in engaging in effective and meaningful philanthropic activities should strive to provide the appropriate kind of support to local organizations.

The Survey Participants: Our thanks to all those who participated in this survey!

Organization Name	What they do	Type of Philanthropy			Who Contributes	
		Money	Volunteers	Materials & Goods	Travelers	Companies
Learning Space	Nursery and early education	Yes (although few donations)	Sometimes	Yes	NA	Yes
Ujamaa Community Resource Trust	Social justice advocacy and sustainable natural resource management	Yes	Yes	Yes	Yes	Yes
Faraja Young Women's Development Unit	Vocational Training for disadvantaged women	Yes (mostly from volunteers)	Yes	Yes	Yes	No
Tumaini for Africa's Children Center	Orphanage and kindergarten	Yes	Yes	Yes	Yes	Yes
Pastoralist Women's Council	Women's empowerment through education and micro-finance	Yes	Yes	Yes	Yes	Yes
Sauti Moja	Community HIV/AIDS Program; Early Child Development Program; Gender Advocacy	Yes	Yes	Yes	Yes (mostly from volunteers)	NA
Amani Children's Center	A home and education for homeless and orphaned children	Yes	Yes	Yes	Yes	Yes
Rift Valley Children's Village	Orphanage and school	Yes	Yes (only one)	Yes	Yes	Yes
The Arusha Children's Trust	Support the education of underprivileged children and young adults	Yes	Yes	Yes	Yes	Yes
The School of St. Jude's	Providing early education to secondary to underprivileged children	Yes	Yes	Yes	Yes	No
Olasiti Orphan Center	Orphanage and community center	Yes	Yes	Yes	Yes	Yes

The School of St. Jude: What Can I Send?



Answer:

To eliminate any possible anxiety that could surround the arrival of a parcel, we ask you to choose things that are appropriate for school or a few small things that can be shared with siblings, class mates or neighbors.⁵⁶

Here are some ideas we recommend:

For boys and girls:

Re clothing: Families can get good, second hand clothing very cheaply in the markets in town, so instead we recommend quality dark blue or black socks; quality underwear; long raincoat (the rain is very heavy during the wet season); waterproof labels with student's full name for clothing (particularly for boarding students); a waterproof school backpack; a cloth library bag; blue or black pens; quality coloring pencils (e.g. Crayola, Staedtler or Faber-Castell); erasers; rulers; sharpeners; pencil-case; dictionary (e.g. Nicholas Awde: Swahili-English, English-Swahili Practical Dictionary - Hippocrene); books (see last page). And lastly our students absolutely love receiving stickers and photos of their sponsor's family, or a map!

For girls:

A skipping rope, inexpensive jewelry (e.g. from a \$2-shop), tennis balls, or small simple toys. Clothing: If you do decide to send skirts or dresses, be aware that East African culture is conservative therefore, sleeveless, body-hugging clothes and mini-skirts are not appropriate.

For boys:

A soccer ball, a pump for the football, juggling balls, toy cars, anything science related.

PLEASE DO NOT SEND:

DVDs, computer games or things that require electricity or batteries. Even though batteries are available here, we do not want the students to ask their parents to buy batteries.

Reading Books:

Feel free to send any reading or educational books that you think appropriate, but if you would like some recommendations, here are some suggestions:

⁵⁶ The School of St. Jude, website: <http://www.schoolofstjude.co.tz/SupportUs/SponsorshipFAQ/tabid/291/Default.aspx>

General:

- English dictionaries – simple picture ones for younger students and primary school ones for older students.
- English / Swahili dictionaries
- Student atlases
- Fairy Tales – favorites are Cinderella, Snow White, Sleeping Beauty, Rapunzel
- Books about sports, football/soccer (especially for the boys)
- Books about famous African sports people and role models
- Books on the solar system. Most kids here love hearing about outer space.
- Funny poems do well with this age group
- Any books with African themes or about subjects that the children will have experienced - e.g. lions, zebras, elephant stories

Prep & Standard 1:

- Stories with very simple English and rhyming words
- Books by Eric Carle such as The Very Hungry Caterpillar
- Bananas in Pyjamas series
- Playschool series
- We All Went on Safari by Laurie Krebs
- A is for Africa by Ifeoma Onyefulu
- Elisabeth's school by Stephanie Stuve-Bodeen (suitable for Standard 1)
- Papa, do you love me? by Barbara M Joosse (suitable for Standard 1)
- Spot series by Eric Hill

Standard 2:

- Dr Seuss
- Disney e.g. The Lion King, Aladdin, Beauty and the Beast, Jungle Book, Tarzan
- We All Went on Safari by Laurie Krebs
- A is for Africa by Ifeoma Onyefulu
- Ashanti to Zulu: African Traditions by Margaret Musgrove
- Elisabeth's school by Stephanie Stuve-Bodeen
- Papa, do you love me? by Barbara M Joosse
- Magic School Bus series by Joanna Cole
- Berenstain Bears series by Stan and Jan Berenstain
- Space books and things that live underwater (corresponds with science lessons)

Standard 3:

- Books from The Geronimo Stilton Series, text by Geronimo Stilton aka Katherine Cristaldi
- Books by Roald Dahl
- Magic School Bus series by Joanna Cole
- Magic Tree House series by Mary Pope Osborne
- Disney e.g. The Lion King, Aladdin, Beauty and the Beast, Jungle Book, Tarzan
- A Pride of African Tales by Donna Washington
- Ashanti to Zulu: African Traditions by Margaret Musgrove
- Bringing the Rain to Kapiti Plain by Verna Aardema

- Space books and things that live underwater (corresponds with science lessons)

Standard 4 & 5:

- Bringing the Rain to Kapiti Plain by Verna Aardema (suitable for Standard 4)
- Books from The Geronimo Stilton Series, text by Geronimo Stilton aka Katherine Cristaldi
- A series from Australia by Emily Rodda
- Books by Roald Dahl
- The Jungle Book
- Deltora Quest Series and Rowan of Rin Series by Emily Rodda
- Tarzan
- Harry Potter series by JK Rowling
- The Wizard of Oz by L. Frank Baum
- The Lion, the Witch and the Wardrobe series by C.S. Lewis
- Lemony Snicket's Series of Unfortunate Events
- Cairo Jim series by Geoffrey McSkimming
- Babysitters series or Mary Kate and Ashley series (for girls)

Standard 6 & 7:

- Nelson Mandela's Favorite African Folktales Edited by Nelson Mandela
- Books from the Rowan Series (1st book – Rowan of Rin) by Emily Rodda
- African Folktales by Roger Abrams
- Harry Potter series by JK Rowling
- The Wizard of Oz by L. Frank Baum
- The Lion, the Witch and the Wardrobe series by C.S. Lewis
- Babysitters series (for girls)
- Adventure books are particularly popular among Standard 6 and older children
- Tin Tin series by Hermes
- Robinson Crusoe.



Rift Valley Children's Village (RVCV) Visitor Policy

**By India Howell
Founder/Director**

Over the past 4 years we've welcomed a large number of visitors to the Rift Valley Children's Village to meet our children and learn about our work. Our purpose has been two-fold: First, to allow people to see firsthand our model for addressing the orphan crisis in Tanzania and second, to spread the word about our work in the hopes of attracting support.

In both cases I believe that we have achieved our goals. However, as the years have passed and word of our work has spread, the number of people asking to visit has grown to a point where it is becoming unmanageable and potentially detrimental to our children.

In addition, as the number of visitor requests has grown we have seen more and more groups arrive who don't have a genuine interest in seeing the Children's Village. "It was just on the itinerary" is a phrase we've heard too often.

We have come to the conclusion that in order to continue to welcome visitors while not creating a "zoo like" atmosphere for our children, we are making a change in how to screen visitors.

As a result, beginning December 1 of 2008 all visitors will be required to:

1. Contact our Visitor Coordinator in advance to make an appointment at:
tanzanianchildrensfund@habari.co.tz.
2. Make a donation of \$50 per person when they visit the Children's Village.

Donations should be presented by the safari driver in cash or Tanzanian check at the time of their arrival.

Please note that most of our children attend the local primary school Monday through Friday. As a result the best time to "see us in action" is on weekends. If weekdays are the only time a visit would work for your clients know that there is still a certain amount of activity here on weekdays with pre-school and English/Computer classes. The best time of day to visit is in the morning from 9AM to 12:30PM or in the afternoon from 2PM to 4:30PM

If you have any questions about this new system please do not hesitate to contact me by phone or email at: 0754 300 813 or India@habari.co.tz.

Unwanted Philanthropy

The Paint Syndrome

The following is written by Priscilla Macy, President of Global Sojourns.

As we look at how we can assist those who are less fortunate, our focus often goes to “*What can we give them? What can we do?*” As well meaning as these questions are, it is important to be careful to avoid paternalistic attitudes and wasteful action. Too often those living in economic poverty have had projects implemented in their communities without their request, guidance or input and the efforts often end up making the visitors feel good but do little for the locals and at times, causing more harm than good.

Global Sojourns’ appreciates the comments by a Kenyan pastor who has Westerners visiting his church/community from time to time. He finds that the visitors always want to “do something” and more often than not, they come up with the idea of painting. So he lets them paint to feel like they accomplished something even though it was an unnecessary task. We feel this situation is all too common and we’ve come to call this scenario, “The Paint Syndrome”.

His comments: “You know, Americans always want to paint things. They want to paint buildings, so we have a building we let them paint. Usually we have to repaint the walls after the Americans leave because they don’t do a very good job.”



We use this example to remind ourselves that we need to be careful about looking at a situation from our Western perspective in which “being productive” is a driving motivator. Unless there is a specific need and request for our skills, we find the best thing we can do is to focus on “absorbing” and developing relationships with our local partners rather than “doing”.

Bali’s Orphanage Scam

The following is a portion a shocking article from the Bali Advertiser in Indonesia sent by Jane Crouch, Responsible Travel Manager for Intrepid Travel. Sadly, Bali isn’t the only place where travelers’ philanthropy is fostering exploitation. Jane sent CREST a similar article from South Africa.

Orphanages in developing countries are often run as profit centres, and Bali is sadly no exception to this evil practice. These facilities can be a lucrative business for the people who run them. Many solicit donations in cash or kind from sympathetic tourists and expats which go directly into the pockets of the owners or to benefit their families. Some orphanages use the children as slave labour, forcing them to work on construction sites and beg in the street instead of sending them to school. Most of the orphanages here operate under religious banners; sadly, even a clerical collar is no guarantee that donations will not be misappropriated. How to tell the good ones from the bad?

Over 4,000 children in Bali are housed in 71 orphanages, up from 38 in the early 1990s. Only about 10% of them are technically orphans. The balance are children whose parents are too



Orphanage and School in Bali, Indonesia.
Credit: The Bali Orphanage

poor to care for them, or whose mothers are unmarried or who have re-married and whose husbands don't want the kids. Because the government provides one million rupiah a year for each child in full-time care, the facilities sometimes misrepresent the number of kids they house. These orphanages make most of their money from international NGOs and sympathetic visitors/tourists, who see the poor infrastructure and skinny, ragged children and want to do something to help. Often, these visitors make on-the-spot cash donations, bring clothing and books from their home countries or pledge money for repairs and school fees. Direct gifts of books, clothing or school supplies to the children are often taken away to be sold as soon as the donor leaves. In all but a few cases, the money goes directly into the director's pocket; several boast of sending their own children

to university.

The worst-case scenario is represented by two facilities in Bali run by the same owner. He sends scouts out to approach poor families on the island, offering to provide free food and education for their children which the parents can't afford. Once the children enter the facility, they are not fed properly and the older ones are not allowed to go to school. They are forced to get up before dawn to operate mobile foods stalls or to work on a building site which has been under construction for over 10 years. One of the buildings is alleged to be a home for the 'orphanage' owner, built with unpaid child labor; one child fell to his death from the site this year. Other kids are sent out to beg at night in tourist areas. If the parents try to remove their children or the kids try to leave, they are threatened. If a visitor gives a present to child, it has to be handed over to the director.⁵⁷

⁵⁷ Excerpt from *Bali Advertiser*, 2010 Greenspeak, <http://www.baliadvertiser.biz/articles/greenspeak/2010/orphanage.html>. The article states, "The best way to help other orphanages is by donation in cash and kind to transparent and ethical organizations like Bali Kids www.balikids.org, the John Fawcett Foundation www.balieye.org, Bumi Sehat www.bumisehatbali.org and High 5 www.high5rehab.org. These organizations never give money to the facilities but provide services directly to the children."

Chapter 6:

Engaging Travelers in Travelers' Philanthropy

Unintended Consequences of the Traveler's Best Intentions

By David Abernethy, Ph.D.

Professor Emeritus of Political Science, Stanford University

It's easy to focus on the virtues of good intentions. My goal is not to rain on your parade but maybe to throw a bit of mist on it as we reflect on the ethical worth of what we're doing.

I will play the role of the traveler. Let's assume certain things about me. First, I have the very best intentions. I want to help others. My travels take me to places where some of the world's poorest people live. Whether out of pity or charity or guilt – or some combination of these motives – I want at least a few of those I meet to have more resources and opportunities and to lead somewhat better lives because of my actions.

Second, let's assume that I am able to help others. The fact that I can travel to far-away lands shows that I am far wealthier than the poor people in poor countries whom I encounter. I have access to money that can easily be transferred to those whose yearly income is less than the cost of one day's hotel bill, food, and travel in my itinerary. Moreover, if I'm retired – and many who go on these trips are retired – I have the time to help. This is a precious commodity. If I get excited by a philanthropic project I and my fellow travelers decide to sponsor, I might spend time when I return home, staying in touch with local people to see that the project comes to fruition and providing technical assistance as needed.

Let's further assume that I've got connections. It's not just my *net worth* that matters but also my *networks*, my links to other people. If my travel group agrees to help start a local project – like constructing a well or a health clinic or supplying drip irrigation equipment for farmers or veterinary assistance for pastoralists – I can go see my friends back home. I'm confident I can raise \$10,000 from them to cover Phase 2 of this fine project.

To sum up, we're assuming that I want to help and that I am able to help. I've got the money, I've got the time, and I've got the connections.



Maureen learns about her scarf purchase direct from the maker, Timor-Leste. Credit: Intrepid Travel

Moreover, as a traveler I see a specific situation that calls for constructive action. Yes, I'm aware of the figures on the huge number of people – well over a billion – who live on less than a

dollar a day. But these statistics, while they stay for a while in my head, don't enter my heart. What does engage me emotionally is that, right here and now, I'm in a village where I actually see someone who lives under a dollar a day. The abstraction called poverty suddenly takes on a human face. I hear that person, or members of the community, or the village chief, say, "Here's what we need. Here's what we would like to have." They then ask, "Can you help us?" And I say, "Well, sure."

- **Ethical Action = Good Intentions + Good Consequences**

The question is whether my intention to help in this situation is enough for my transfer of funds, in response to a request for help, to be called ethical. That, in turn, raises the question of what constitutes ethical action. I'm going to define ethical action as requiring a combination of good intentions and good consequences. This means that good intentions are a necessary but not sufficient condition for ethical action. The motive to act and the results of action have to be reasonably consistent with each other.

We're all familiar with the phrase, "The road to hell is paved with good intentions." This phrase points out, wisely, that good intentions do not automatically translate into good outcomes and can, in some cases, be counter-productive.

Let me now suggest several ways in which good intentions might not produce desirable outcomes, particularly for the indigenous recipients of travelers' philanthropic activities.

The first thing to note is a paradox: I as a traveler go out to places with a bias for the status quo, yet my very presence can be a factor undermining the status quo. I may want the natural status quo: an unspoiled beach, a primeval rainforest, wild animals roaming the savannah freely. I want to travel abroad now because in a few years the beach will probably be littered with plastic bags and Coke bottles or swallowed up by rising seas. The tropical forest may be felled, its trees sold to become timber for housing or cardboard packaging. The wild animal herds may be seriously diminished as poachers take their toll and as open rangelands shrink due to ever-growing human demand for alternative uses for the land. I want to win the race against these undesirable signs of "development" and get to enjoy what I consider an "unspoiled" natural environment.

I may also want to preserve the cultural status quo. I want to see indigenous people before they've become "corrupted" by too much contact with outsiders; before they've abandoned traditional clothes they've woven themselves for khakis mass-manufactured in China and sun-glasses like the ones I wear; before they've abandoned traditional dances and musical instruments for American dances and electric guitars. Again, I want to travel now because in a few years the culture I value as being different, even exotic, may have come to look a whole lot more like the American mall culture I left behind.



Filming in rainforest, Costa Rica.
Credit: CREST

But if I'm traveling to see things which I find appealing and which haven't changed - or which, probably incorrectly, I imagine haven't changed - the paradox is that my very presence in another culture is a major factor in altering it. I enjoy watching the local people; that's one reason I'm here. But it also turns out that the local people are observing me, and perhaps with

greater interest and attention to detail than the way I observe them. What do they see in me? They see an agent of radical change, an ambassador (despite myself) of a high-consumption lifestyle beyond their wildest dreams. I might consider myself an ecotourist, wanting to live close to the land. But this self-image is self-deceptive. The inescapable fact is that I may be several hundred times wealthier than those living in the country I've gone to visit, and the consumption lifestyle my income makes possible - with its accompanying heavy demand on the earth's resources - is outlandishly high by village standards. I might see myself as an individual. But in fact I am an agent of the vast, impersonal phenomenon we call globalization.

Someone in the village is carefully observing my hiking shoes, khaki pants, nicely tailored shirt, sunglasses, sun hat, and camera with its telephoto lens and thinking, enviously, "I wish I had those things. They're good looking, they're convenient, and having them would make my neighbors look up to me." Someone is observing the bus or minivan that brought me to the village and thinking, enviously, "Wouldn't it be nice to travel that way and not walk or ride a bicycle when I want to move around?"

These thoughts accentuate the drive for change in that culture, the drive to be like me, to abandon aspects of the culture that are the very things that attracted me to visit that culture.

The same thing applies to nature. It took a great deal of energy, with a lot of trees felled, to build the road to the ecotourism lodge where I'm staying. Heavy trucks regularly take imported wines and beer up that road to the lodge. And then there's the substantial contribution to global warming from the jet fuel that took me from the U.S. or Europe to a land thousands of miles away. The per-person costs to the environment of trans-continental tourism are huge. If I consider myself an environmentalist - and many tourists do -- this is disturbing information I just don't want to hear about.

- **The Law of Unintended Consequences**

So the reality is that to experience "unspoiled" indigenous culture and "unspoiled" nature, I have to become an active participant in spoiling indigenous culture and the natural environment. I cannot escape being an agent of change even if I see myself as an agent of the status quo. In such a paradoxical situation, it's easy for my intentions not to produce the results I have in mind. In fact, my profound misunderstanding of my own impact on the local setting and of how I am perceived provides the optimal opportunity for the law of unintended consequences to operate. That law can operate in any interaction among humans. But it's especially likely to apply when interactions cross cultural and linguistic lines, and even more so when basic misunderstandings of the self and of others are at play, as they are in this situation.

Secondly - and to turn the paradox on its head - I see my charitable actions as agents of change, but those actions may be opposed by influential local people who want to maintain the status quo.

Let me give an example. My goal in contributing money for a well, maternity clinic, school, rabbit hutch, piggery, drip irrigation project, bridge, etc. is to change the local situation. The



community didn't have what I am giving before I gave it. Now, hopefully, it will have it. I see the change – and I believe many local people agree – as a change for the better. This is improvement, development, an element of modernization. In a sense, I am a progressive revolutionary outsider.

Now, because I am an outsider, I am ill-informed and naïve about the local village. I tend to think of it as a single unit made up of people who get along with each other and have fairly uniform preferences. As proof, I say, “The local people in this community seem so happy. They smile at me. They laugh a lot even though they are incredibly poor. This is amazing.” But this observation doesn't prove my point. And my use of the term “community” is misleading. It implies people in a commune, everybody together, operating as one cooperative unit.

We know that our own society does not operate that way. We have factions, social and economic hierarchies, groups with competing ideological beliefs and public policy preferences. Yet, despite this knowledge of ourselves, we tend to idealize “the locals” as being fundamentally different from us and not having these same characteristics. The image of the “noble savage” lives on. But this image is a myth. Inequality exists even in the poorest communities. Every human being lives in a social setting divided by factions, hierarchies, disagreements over values and preferences, and personal struggles for power and status. Even in what appears to be the idyllic village I want to help, there are some with more wealth, status, power, and influence than others. And disagreements over the direction the community should take and over how fast it should get there.

The change I have in mind through my generosity could start to shake up the village's stratification system. Let me take an example from areas lacking easy access to water: digging a well and providing it with a diesel pump. This I see as a public good. Everyone stands to benefit from access to water, particularly if it's better quality than the muddy river from which villagers currently take their supply.

For the men in the village, however, the well can have a quite different meaning. It is going to benefit women more than men. Why? Because fetching water is women's work. They have to walk five miles to the river and bring the water back in gourds perched precariously on their heads. Men don't do this. So a benefit perceived by me, the outsider, as a public good is seen by men, who hold the formal power in the village, as lowering their status because women no longer have to carry out this time-consuming, physically exhausting task. That I don't understand and appreciate these views is irrelevant. The tipping of the scales in favor of a disadvantaged group is clearly seen by the advantaged elements in the village. For them, a well is not an incontrovertibly public good.

Moreover, women will soon have more time on their hands because they're not on their way to and from the distant river. What are they going to do with that time? Perhaps they are going to get together and demand an additional raise in their status. The new well set the precedent for



Clinic in Niono, Mali. Credit: Masoud.NYC

them, a precedent they value. Its construction, financed by innocent outsiders, challenges long-standing gender relationships and portends further challenges in the future.

Think of this situation in geographical terms. Where you locate a well or school or clinic or bridge or any other piece of physical infrastructure is going to benefit some people more than others. Some people will ask, "Why did those foreigners build the clinic on the other side of the river and not on our side?" "Why did they build the bridge five miles upriver, which helps people in the rival village much more than it helps us?" You can easily imagine a sense of grievance developing because some people gained more from an amenity than others. As a general rule, those benefitting from an amenity are likely to take it for granted and not think much about it once it's in place. But those who don't benefit from it, or who benefit less than others, continue to dwell on what they have lost. A sense of grievance persists longer than a sense of satisfaction.

When an act of generosity from the outside can be interpreted by village elites as lowering their power, income, and status, then it is seen as a backward move. What can elites do? One obvious option is to sabotage the project. Sabotage is quite easy once the project's funders have left, as tourists do shortly after they've made some kind of oral or signed contract with a village notable. "Now they've gone," thinks the notable. "But I'm still here. And I will still be here years from now. The power I have will be used to stop this project in its tracks."

So I, the tourist, may find my best intentions thwarted by the very person who smiled with apparently genuine thanks as he signed the contract with my tour group manager. It turns out that this person would rather have no project than one that could conceivably hurt his relative position in the village hierarchy. This is not to say that the village notable is a bad person. Rather, it confirms that he is a human being. Everywhere you have status systems, which mean systems where people's sense of their own worth is defined relative to their sense of others' worth. Even if the project helps them in an objective sense, if it harms them in a subjective sense they will do what they can to slow down the project or cancel it altogether.

- **A Simple Photo and A Thank You: It's More Complex Than It Seems**

Now let's take a third situation. As a donor I prefer to give to something I can take a picture of. I want a photo, three months later, a year later, and on completion, of that well, bridge, or clinic. I want pictures showing happy people drawing water from the well and walking across the finished bridge. I want to see happy kids in front of a new health clinic, showing off the bandages on their arms where the nurse vaccinated them for yellow fever. I don't ask for much in return for my generosity. But I do ask for those pictures. If nothing else, they prove that my money was not embezzled for someone's private use but was actually put to its intended purpose.



Implicitly, however, I want something else. I want to be thanked. I'd like to hear a villager say, in a video clip, "Thank you, David, for making our lives better." This all seems very reasonable.

But might something happen to lead local people to say instead, "I don't want to say thank you," or if they go in front of the camera, to say thanks grudgingly?

Yes, something like that might happen. Note that my brief visit to the village can make the villagers realize, or sense more intently than before, that whatever inequality there is within the village is dwarfed by the inequality in the world outside the village. "Any one of those visitors had an income equal to our whole village. We didn't think of ourselves before they came as being poor. But now we do, because their visit forces us to compare ourselves to them. Realizing that we are poor makes us envious, jealous, unhappy."

One way to express that unhappiness is against its apparent source, the rich donor. Let me lay out an entirely reasonable and understandable mental scenario on the part of a villager. "Here they are, the richest people in the world coming to see us, perhaps because they enjoy showing off their wealth among people like us who are miserably poor. Besides, did they deserve all that wealth? I didn't see any evidence that they are better than we are, morally. Instead, some of them got drunk and were rude to the waiters. In addition, there's no connection between wealth and work. We didn't see them working the entire time they were here. In fact, they spent the whole day partying, acting like life was one big vacation. It was we who did the work, not only on our farms but also in the lodge, cleaning their rooms, preparing their food, and serving it to them. The inequality we observe is not only enormous; it's also unfair and unjustified. I don't like the tourists, because they have things they don't deserve."

Added to this perception is the problem of dependence. Charity generates dependence. If money comes from the outside, it almost invariably makes the recipient dependent on the donor. The recipient is getting something, but not for free: the gift comes with strings, conditions, that the money be used for a particular purpose. The recipient is expected to meet those conditions.

Moreover, up to this point the village may have been relatively self-reliant, producing much of the food, clothing, and household goods it consumes and consuming much of what it produces. This is a result less of conscious choice than of geography and level of development. The village may be physically isolated from other villages, with no road through it and no bridge across the river and no buses or trucks to transport people and the commodities they produce from home to a market several miles away. The very act of the tourist coming in, as a follow-up to the bulldozers, roads, contractors, imported carpenters and plumbers building the lodges where the tourists stay, links villages to the outside world and permanently destroys their self-reliance. This change creates the setting for dependency to flourish. In the worst case, it turns dependency into a welfare handout. Villagers can come to see the tourist donation not as a one-time transaction but as Round 1 in a series of gifts expected in the future. After all, the tourist clearly has a lot more money than the amount he is giving, as well as access to others with money. It becomes easy, based on one act of unexpected generosity, for recipients to come to expect others like it; and to become upset at the donor if future gifts aren't forthcoming.

Here again we have an understandable misunderstanding. It is not because villagers are bad people that they think like this. It's because they are human beings like us. They are rational creatures, making rough predictions about the future based on what they observe to be happening in the present.

The dependency I'm talking about takes the recurring form of recipients not taking psychological "ownership" of a project. The well, clinic, or bridge is seen by them as belonging to the donor, not to themselves.

So my gift can generate resentment by recipients that I am so wealthy I have extra cash to give, that I make the villagers feel poor, and an uncomfortable sense that I make them feel dependent on me. In such a situation people may not want to say "thank you" in front of a camera.

There was a great cartoon, many years ago, of Egypt's President Gamal Abdel Nasser receiving a giant package from Uncle Sam labeled "AID." Nasser says to Uncle Sam, "Thank you. Go to hell." The gratitude and the resentment are both there, mingled together.

If no one thanks me for my generosity, who is the next person to become resentful? Me, the donor! I think to myself, "All I asked for was thanks. That's not much, and it was something the villagers could easily have given. They had every reason to be grateful because they received a free good, something they wanted but wouldn't have gotten if it hadn't been for my generosity. What the hell is wrong with these people? If they're going to act like this, then that's the last time I'll ever give to a charitable organization helping developing countries."

So now we have resentment on the part of the recipient and the donor. This isn't a good way to end a story based, initially, on the best of intentions!

- **Passing the Money and Responsibility**

Now let's look at another problem. The traveler, by definition, is here today and gone tomorrow, off to another place on a busy itinerary. What stays around is the money that I, the traveler, donate. I and my money are soon parted. But with whom do I leave that money?

Naturally I want to leave it in the hands of someone who is trustworthy and isn't likely to put it in his or her back pocket for private use. The person also has to have some locally acknowledged authority to spend the money and the ability to track its use so that others don't misuse donated funds. And the person has to have some administrative ability to implement a project, to take it from a pleasant vision to something that actually exists "on the ground." Someone has to identify the contractors, sign contracts, recruit and train the labor force. It turns out that a huge amount of work is involved in project implementation, all of it after I have left the scene and gone on to my next tourist attraction.

But in many situations no such person, with all these admirable qualities, exists. Even if this person could be found, unless the donation includes reasonable compensation to the agent for all this work, there would be no incentive to take the job. Nor may the contractors and sub-contractors and skilled artisans be available locally. They may have to be brought in from outside the village and housed nearby, further disrupting the local status quo.

Here, I think, the donor has three options. One is to leave the money in the hands of someone connected with the tourist industry: the lodge's owner or the tour operator. A second is to leave it with a village member with recognized status, such as the chief or top elected official. The differences between these two potential recipients are substantial and visible. The former is quite likely a "European," a white person, and someone who may or may not be a citizen of the country. The latter is a "person of color" who is a citizen of the country. The former is by local standards quite wealthy; the latter is not. The former may or may not know the local

culture and language; the latter knows these things intimately “from the inside.” The former is on “my side of the line” in terms of race, language, and social and economic class. The latter is on the other side of the line in all these respects.

A third option is to leave the money with an organization with close ties to the village. This might be the Village Council, the Local Government Council, or a grassroots NGO (non-governmental organization).

For a variety of reasons, I am likely to leave the money with the lodge owner or the tour operating company. In other words, the money will exchange hands nationally but not culturally and racially. For one thing, I may believe that other white people are not going to steal from me but that non-whites might do so. That’s a residue of racism that, even in my own liberal heart, is still there. I feel I can trust certain kinds of people – “my kinds of people” – while I should be wary of people different in important ways from me.

But this view need not be dismissed as simple racism. There is an aspect, as economists will point out, of incentives and leverage. If an ecolodge tour owner or a tour operator misuses the money, I have leverage over them. I can spread the word to my friends that these guys are untrustworthy; don’t give them the business when they visit that country. If I leave the money with local people, however, this leverage is gone. There’s nothing I can do if someone from that group runs off with the money.

Moreover, the quick negotiations carried out before I leave tomorrow morning are likely to take place over drinks in the tour lodge after sundown. The lodge owner comes over and says, “I hear you guys want to do something to help the local people.” And I say, “That’s right. Sit down and have a drink.” And so we get together in the most comfortable and congenial of settings. I’ve just had an exhilarating day chasing wild animals. The sun has just set in a blaze of glory. We’re drinking Chivas Regal. We laugh and look each other in the eyes and make the deal. This is what happens all the time in the real world: people are more likely to make deals when the circumstances are physically and socially comfortable.

Now imagine the alternative of trying to pass the money and responsibility over to someone who is local and doesn’t speak my language. This person may not have even been in the lodge except being brought there some time ago for symbolic or feel-good purposes. He (the individual is almost certainly going to be a “he”) doesn’t understand how deals are made within a racial group and social class to which he doesn’t belong. So I’m very unlikely to turn cash and responsibility over to him. This isn’t because any of us – the lodge owner, myself, the village chief – is a bad person. It’s because comfort levels in these situations are very different. And comfort levels correlate positively with levels of interpersonal trust.



What about the third option: an organization rather than a person? That’s not likely because as a short-term visitor I won’t even know the organization exists unless the lodge owner mentions it

to me as an option. Besides, it's much easier to negotiate with a person than with an organization, particularly if I have no idea of organizational dynamics and if time is of the essence. Remember, I'm leaving early tomorrow morning. If this thing isn't settled within an hour, the whole deal is off.

What happens if I pass the money and responsibility to the lodge owner? For one thing, it increases stratification within a social system that now includes the village and the tourist lodge, giving the lodge owner even more money and leverage over the villagers than before. It means that villagers are now dependent not just on me but also on the lodge owner who will decide who wins the contract, who is hired to dig the well or put up the bridge's foundations. What it also does, in a much more subtle way, is to undercut local people's sense of self-reliance, autonomy, and dignity. After all, I said I wanted to help them. But when push came to shove, words to actions, I didn't trust any of them to get the job done.

If one reason for my helping others was to increase their capacity to make their own decisions and carry them out, then I have just undermined my own intentions.

- **Impulse Giving vs. Community Priorities**

Another point: the donor often decides what to do on an impulsive basis. This is entirely understandable. I'm in the village for one or at most two days. I thus have a window of a few hours within which to decide about something of which I was completely unaware before I entered the village. I'm walking along a dusty path near the village, and I see a little girl. She comes up to me, smiles broadly, and says, "Mister, I want to go to school. But I don't have the school fees." Well, that's it. I respond impulsively and generously to a human being, not to the Third World, not to the world's poor, but to this one little girl with the wide eyes and beguiling smile and utterly commendable desire to become a student.

What's not to like about this scenario? Part of its ethical value is its impulsiveness, its spontaneity. Things just happened this way; I didn't plan for them or expect them. And isn't it delightful to have a genuine, unexpected experience once in a while? Isn't that very possibility, at some deep level, why I decided to be a tourist and visit this far-off spot? What a contrast to my itinerary, which is planned down to the last 30 minutes!

But there is a downside. This unplanned encounter is a random event. I decide to pay the little girl's school fees or support the village primary school simply because I met the girl on the path. This has nothing to do with the needs or preferences of the village. There may or may not be a way to determine their collective preferences. But even if there is, I don't have the time or energy to find out what it is. Suppose that the villagers, or leaders in whom they had confidence, felt that health or agriculture or a paved road to a large market town was a higher priority than education, shouldn't that have changed the content of my gift? Ideally, I want the gift to meet the wants, needs, priorities of the recipients. But given limited time and the emotional power of the random experience I just had, the chances of a comprehensive, thoughtful, deliberative process occurring, with many parties involved in the discussion, are just about nil.



Jungle Bay community project,
Dominica. Credit: Jungle Bay

- **The Recipient Must Take Ownership**

Does this matter in terms of implementation? It matters enormously, because at some point the recipient has to take ownership – psychological as well as legal and financial – of the project. If there is no ownership, if the key stakeholder in fact has minimal stake in the project's success, then what happens? When the school runs out of supplies; when the well silts up or its pump fails and no spare parts are available; when the drip irrigation pipe needs to be replaced; when the bridge cracks under the pressure of water surging over it in the next flood; when the school or clinic runs out of basic supplies, then local people will say, "This isn't our problem. This is something for the donor to come fix. After all, it was their idea from the start. They defined our needs, not we. They set our priorities, not we. They have the money for repair and maintenance, not we. We keep waiting for them to come to help, and they fail to do their part." In the meantime, of course, the donor's charitable investment is essentially wasted.

- **Donations Must Include Funds for Maintenance**

Anyone who has studied the sorry history of much foreign aid, involving transactions between a donor government or intergovernmental agency and a recipient government, must acknowledge the recurring problem of insufficient project maintenance. It's what happens after a project is completed and the ribbon-cutting ceremonies are performed that determines the rate of return on the investment. But all too frequently negotiations between donors and recipients are over the nature and location of the project, not over maintenance – or rather, not over who has the responsibility to cover maintenance costs. Because this key issue is glossed over, each side incorrectly assumes that the other will take care of problems when they arise. The predictable result of this misunderstanding is lack of maintenance, lack of spare parts, lack of training to repair machinery that fails. This, in turn, means that when a well silts up or a bridge cracks, the rate of return on a substantial infrastructural investment falls to zero. An observation that applies to aid relationships between large, bureaucratic governmental agencies applies as well to the small-scale, unofficial, non-bureaucratic examples on which I have focused.

So the dilemma I, the well-intentioned tourist, face is whether to make a quick, impulsive decision to fund a project in which I have some emotional investment, though with some vague awareness that it's not going to be "owned" by the people for whose benefit it is intended and consequently is unlikely to be sustained over time. There is no ready way out of this dilemma.

What this discussion indicates is that any negotiations over an aid project – large and small, involving governments or private individuals – should address the critical issue of who funds and administers project maintenance. If this issue cannot be resolved to mutual satisfaction at early stages of negotiations, then there is a good case for abandoning the project.

- **Reducing the Risks of Failure**

Let me conclude with some reflections on what should be done. I've focused on the ways in which a tourist's good intentions can lead to negative results. From this a reader might conclude that tourist philanthropy is a losing proposition and should be abandoned. But that is not my conclusion. Good intentions, while insufficient for ethical action, remain essential

conditions for it. If a tourist is indifferent to the poverty and suffering observed during trips to the poorest parts of the earth, then the tourist will not be acting ethically in situations where trying to use one's wealth and connections to help others is – I would argue – morally obligatory. If good intentions can produce bad outcomes, a starting point is frankly acknowledging that this is so. Such acknowledgement takes us on the right path: away from naiveté about human nature and human interactions, away from self-delusion and from premature self-congratulation about how noble we are. Where our expectations for success are too high, then the answer is to lower them, not to abandon expectations altogether. Where we have failed to examine incentives and disincentives built into project design, then we should build in positive incentives for key actors to do their job and reduce disincentives to sabotage the work. Once we identify the mechanisms by which a donor's good intentions can go astray, we can set up counter-mechanisms that anticipate problems and creatively bypass or overcome them. We can act philanthropically on a deliberately experimental basis, continually learning what works and doesn't work and refining behaviors and institutions so the chances for success next time are increased. The risk of failure is always there. The challenge is not to eliminate risk but to reduce it to a manageable level.

- **A Checklist of Criteria for Ethical Travelers' Philanthropy**

A specific recommendation is to turn to the third alternative mentioned in my earlier scenario about where the philanthropic tourist's money should be placed. I said very little then about grassroots organizations with local knowledge and local legitimacy, but now I'll say more. A tour lodge owner or tour operator has, I believe, a moral obligation to search for and identify such an organization, if it can be found, and to work closely with that organization to identify projects meeting the following criteria:

- ✓ Is the project sufficiently small-scale and low-tech that it can be implemented fairly easily, with substantial reliance on local labor and expertise?
- ✓ Is the project needed and desired by the local people? Assuming that there will be disagreements on this score, is there a mechanism – or could one be set up - to set local-level priorities and make them known to future tourists expressing a desire to help? An important factor here is getting advance commitments by local people to contribute “sweat equity” to a project. Their free labor reduces project costs, builds upon traditions of community self-reliance, and indicates collective commitment on the part of the beneficiaries to see a project through to the end. Free local labor increases the chances that the community will take psychological ownership of the project, maintain it after completion, and not fall into the dependency trap.
- ✓ Can agreement be reached in advance of starting a project as to who will finance and administer maintenance and repair costs of infrastructure, so there is a sustainable return on the tourists' philanthropic investment?
- ✓ Is the project likely to appeal to future tourists visiting the lodge?



Amy Biehl Township Tours. Capetown.
Credit: www.amybiehl.co.za

- ✓ Can photographs be taken along the way toward completion, to demonstrate to tourists who have returned home that their money is being spent as intended and to meet the tourists' desire for visible evidence of their generosity's impact?
- ✓ Note in this scenario that potential recipients and handlers of philanthropic funds are acting preemptively, before the generous tourist even arrives. Ideally, they will have a feasible, widely accepted, attractive plan of action to suggest in the event that this future tourist expresses a desire to help. What is lost in spontaneity is gained in legitimacy and the likelihood of project sustainability.

On trips where I've been the faculty lecturer, we try to build into our itinerary a visit to at least one local NGO or a meeting with its leaders. In South Africa, our group has visited the violence prevention programs of the Amy Biehl Foundation. Amy was a student here at Stanford, and I taught her in her freshman year a course on southern Africa. She was murdered in 1993 at the conclusion of a Fulbright Fellowship in South Africa by young black men in the Cape Town township in which she was driving, men who wanted to take revenge on white "settlers" who had created the very system of apartheid Amy was fervently committed to fight. Of course I was deeply affected by her murder and by the transformation of her parents, who did the almost unthinkable thing of forgiving her killers, going on to establish programs in the townships to reduce violence and create employment for young people. In 1997, at the end of a trip down the African Great Rift Valley, our group worshiped at a Roman Catholic Church in Guguletu township, close to the site where Amy was killed. Our travelers had seen the best game parks in eastern and southern Africa. But what happened in Saint Gabriel's Church was, for many of us, by far the most memorable experience of the entire trip. It was incredibly moving for us to be dispersed in twos and threes throughout a black worshipping community that warmly welcomed us, to hear the sermon preached in three languages, and to join in the rousing singing of hymns, with teenagers accompanying the congregation on their marimbas. Yes, the large game animals we saw in the parks were impressive. But even more so was this human contact at a deep level, made possible through an organization with strong local roots.

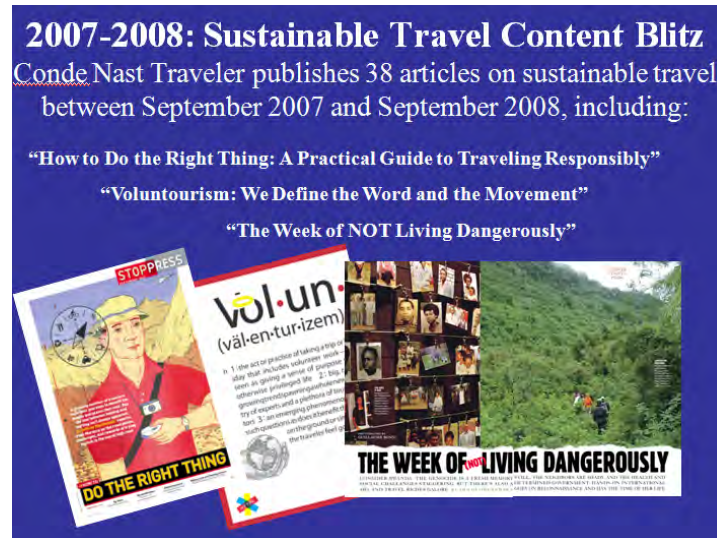
It helps if a grassroots organization has been vetted by an outside NGO with a good reputation and has a record of working well with the outside group. On other trips I've led I contacted the Global Fund for Women, a U.S.-based NGO which gives small grants to women's groups throughout the developing world, and the Ashoka Fellows Program, also U.S.-based, which identifies social entrepreneurs from developing countries who have initiated impressive development and social service projects. With their help I identify local organizations in the countries we will visit. We schedule a visit to the organization's headquarters and invite its leader to share a meal with us. While we ask these grassroots organizations not to solicit funds, Travel/Study tour managers make available to our travelers the organizations' names and addresses should a traveler choose privately to contribute to their work.

Identifying locally legitimate organizations and working with them to fulfill the criteria I've listed above increases the chances that tourist philanthropy will constitute ethical action. Success is never assured. Indeed, for the reasons I've given, it is unlikely. But if the chances of success can be raised a bit through the approach I suggest, the effort will have been worthwhile.⁵⁸

⁵⁸ This chapter is adapted from Dr. Abernethy's talk to the 1st International Travelers' Philanthropy Conference organized by CREST in April, 2004 at Stanford University.

Consumer Demand for Travelers' Philanthropy

Compiled by Martha Honey



Numerous surveys and studies have demonstrated the substantial and growing consumer interest in selecting companies that give back to local communities and conservation. Here are some of the findings.

- More than 2/3 of U.S. and Australian travelers, and 90% of British tourists, consider active protection of the environment, including support of local communities, to be part of a hotel's responsibility. (International Hotels Environment Initiative/IHEI, "Consumer Attitudes Towards the Role of Hotels in International Environmental Sustainability," 2002.)
- 46 million U.S. travelers chose companies that "donate part of their proceeds to charities." (CREST, "The Market for Responsible tourism Products with a Special Focus on Latin America and Nepal," prepared for SNV, March 2010.)
- In 2007, 74% of *Conde Nast Traveler* readers said hotels should be responsible for helping relieve poverty in local community. (*Condé Nast Traveler*, "The Ethical Traveler Index," 2007.)
- In the U.S., individuals represent the largest single source (75%) of philanthropic dollars: \$229 billion in 2007. (Giving USA Foundation, *Giving USA: The Annual Report on Philanthropy*, 2009.)
- More than 75% say their travel should not damage environment; 38% willing to pay more to use companies that benefit local communities and conservation. (Travel Industry of America and *National Geographic Traveler*, "Geotourism: The New Trend in Travel: Overview of American Travelers," 2003.)

- In the U.S., 80% of tourists say they want hotels they chose to not damage the environment is important, *but only 14%* ask if hotel has environmental policy. (IHEI, 2002.)
- 80% of tourists say it is important to them that the hotels they choose not damage the environment, *but only 14%* ask if hotel has environmental policy. (IHEI, 2002.)
- Euromonitor reported in 2008, a growing trend among North Americans, who may be time-starved but cash-rich, to take luxury vacations that include some philanthropy along with relaxation. (World Travel Mart, *World Travel Market Global Trends Report*, 2008.)
- A 2009 CMI Green survey found the following demand for travelers' philanthropy:
 - 38.2% are most comfortable giving to a local charity/nonprofit encountered while abroad.
 - 83.7% of travelers have donated between \$11 and \$500 to individuals or charitable organizations while traveling.
 - 37.9% are most likely to give to an environmental or conservation project.
 - 53.4% are most comfortable giving to a nonprofit in their home country that works in the country they are visiting.
 - 32.3% are most likely to give to an education related project.
 - 42.7% donated to individuals or organizations while traveling.
(CMI Green, *The CMI Traveler Survey 2009*, vol. 1, 2009.)
- *Conde Nast Traveler* magazine has done surveys to measure the interest of their readers in travelers' philanthropy. Their findings show:
 - A full 75% of readers say that they consider a property's environmental policy when choosing a hotel.
 - 73% of their readers would be willing to pay more to stay in a hotel that helps support the local community through health and education initiatives.
 - ❖ 20% would spend between 1-5% more
 - ❖ 29% would spend between 6-10% more
 - ❖ 24% would spend 10% more
- *Conde Nast* readers expect hotels to:
 - Be environmentally friendly: 87%
 - Help to relieve poverty in local communities: 67%
 - Contributes a percentage of revenues to local communities: 65%
- Where help should go: *Conde Nast* readers' priorities:
 - Employment: 93%
 - Clean Water: 86%
 - Education: 73%
 - Food: 72%
 - Healthcare: 65%
 - Shelter/lodging: 57%
 - Clothing: 51%

Why Travelers Become Philanthropists: Donor Motivations

By Jill Talladay, Graduate Student,
Sustainable Tourism, George Washington University

In order to better understand why travelers become donors, in-depth interviews were conducted with 12 Americans and one Canadian who traveled in Latin America, Asia, and Africa with one of four US-based tourism companies. The companies -- Country Walkers, Global Sojourns, Holbrook Travel, and Myths and Mountains – all have well developed travelers' philanthropy programs. They supplied a list of their donors who could be interviewed. The travelers interviewed live in eight different states or provinces, two thirds are female and all are either retired or current professionals; several described themselves as lifelong donors, while others said they became donors for the first time while traveling. The survey was conducted through a series of telephone interviews in July and August 2010.

The following summarizes the most pertinent responses to the survey questions.

- **What First Drew You to Philanthropy as a Part of Travel?**

Many of those interviewed said that a specific event or funding request convinced them to make their first financial contribution while traveling. A number said that they were originally inspired to donate by the head of the travel company. Some already knew this person through personal relationships. Others said they were moved to contribute when they first learned about the projects at a travel company's fundraising event where they met the head of the company. Several of those interviewed described themselves as experienced philanthropists who expanded their giving to support projects they learned of through travel.

In addition, many of those surveyed said that they were moved by visiting projects and witnessing the reactions of local beneficiaries. For instance, a technology consultant described the dedication of a library in Nepal that was built through Myths and Mountains' READ (Rural Education and Development) Global program, "The entire village took the day off to come to the ceremony." The READ program raises funds for libraries and small community business enterprises in Nepal, India, and Bhutan. (See Myths and Mountains and READ Global case study). This respondent added in gratitude and respect for the READ program, "Many residents have photos of Toni [Neubauer, the founder and owner of Myths and Mountains] visibly displayed as they might have a photo of their president." Another respondent, a 62-year-old male financial executive also inspired by the READ program, commented, "I only support projects that I know directly as I find it a lot more rewarding to spend money on things I can connect to, see, experience, and be involved with."



Donations to READ Global Library, Nepal.
Credit: Toni Neubauer

Two other interviewees commented that they witnessed the positive impact their site visits had upon young people who were on their trip. A 51 year-old woman who visited Honduras with Holbrook Travel explained, “I brought my nine-year-old son on the trip and he was initially embarrassed to be bringing pencils for local school kids. However, the experience opened his eyes and made him more aware of waste and consumption of our resources at home.” After a trip with Global Sojourns to South Africa, one donor recommended that “all high school students should be required to experience a philanthropic trip like this in order to understand and appreciate our differences and our similarities.”

- **What Type of Project(s) have You Selected to Support and Why?**

Those surveyed used terms such as “educational”, “capacity building” and “sustainable empowerment” to describe the types of projects they have chosen to support. Many noted that they selected projects where they could see that the community was receiving direct economic or educational benefits. These included schools and educational programs such as Global Sojourns’ empowerment workshops for girls. Holbrook Travel’s student trips to schools in Costa Rica have helped raise funds for scholarships, built a computer lab, and constructed a sidewalk along the busy road leading to the school. A 63-year-old retired travel agent explained that she decided to donate to educational programs because “when people are literate they have more control over their lives and it opens their world to opportunity.”

Other projects supported by interviewees centered on micro businesses. For instance, Global Sojourns supports garden projects in South Africa where communities grow and sell produce. All READ library projects require a business model that sustains the library through revenue generated from community businesses. In Nepal these include income from rental space and ambulance, telephone, and cable services. These projects “create ownership and trickle down into the community,” explained a 51 year-old male venture capitalist that traveled with Myths and Mountains.

Those surveyed indicated that they favor small grass roots initiatives with low overhead, clear and measurable goals, and a sustainable model to ensure their longevity. Global Sojourns’ clients provide support through “Giving Circles” that fund, typically for three years, small organizations and programs in Africa that make a direct and lasting impact upon those they serve. For instance, several of those who traveled with Global Sojourns said that they chose to support Ray of Hope, an organization that assists HIV/AIDS orphans with their education and other living expenses. Many of those interviewed emphasized that sustainability is an important component of projects they chose to support. A 69-year-old retired politician noted that he was pleased to find that “ongoing relationships are kept with all READ Global projects to assure their sustainability.”

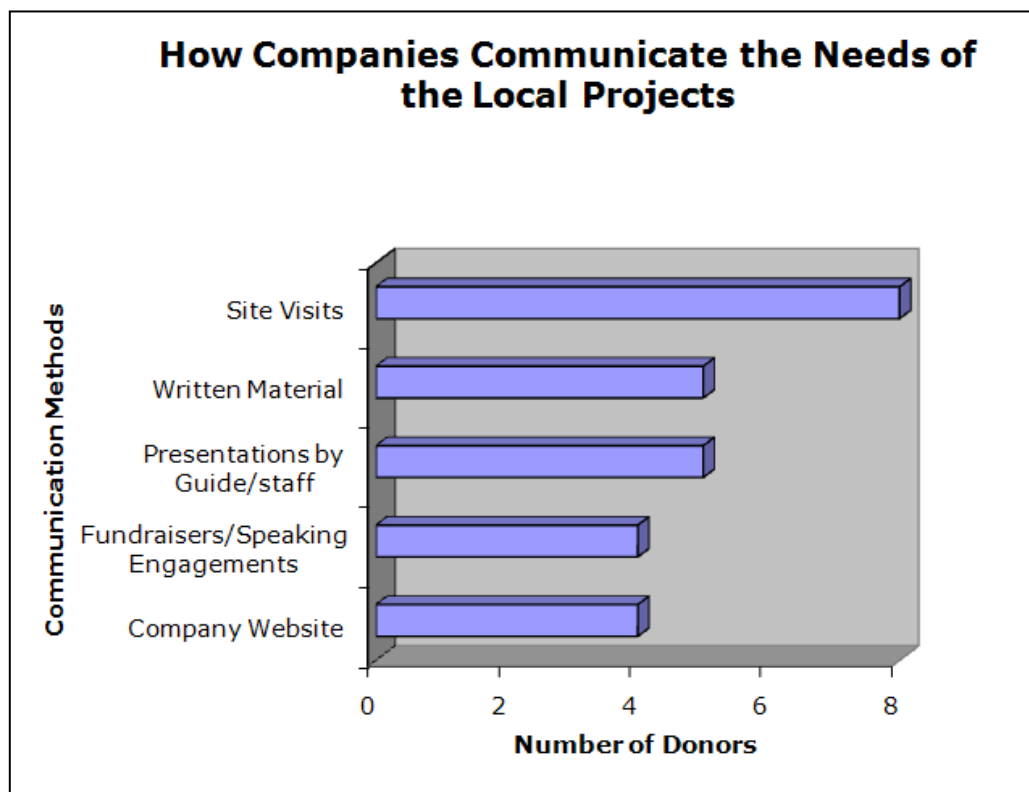


Giving Circle trip in southern Africa.
Credit: Global Sojourns

- **What Form of Communications was Most Effective in Helping You Reach a Decision to Contribute?**

Many of the donors interviewed said that the company they traveled with was very effective in its communications about the projects they were supporting. They reported that the companies use a variety of methods to give visitors information about the community projects they are assisting. These include written materials provided before or during a trip; onsite visits; presentations by community or company representatives; and post-trip updates, usually in the form of newsletters. Companies also provide information via their websites and, in some case, through emails and phone calls.

Those surveyed said that they found it most effective to hear directly from local leaders or to personally visit the local project or organization. An educator who traveled with Global Sojourns said she was “bought into the Giving Circles because it’s done in a truly responsible way.” A financial executive who traveled with Myths and Mountains stated, “Toni’s presentation was passionate and compelling and she, personally, was so credible” that he was hooked.



The majority of interviewees said that visiting the projects and seeing the impact of visitor donations was most important in convincing them to contribute. A 56-year-old real estate manager who traveled to Peru with Country Walkers said that her initial motivation was to see Manchu Picchu, however, it was her visit to the school in Peru, the commitment of her guide, and his pride in his community that inspired her to make a donation. The guide, Juan Carlos Yanez, “was so passionate about the needs of his community that he provided an emotional connection,” she explained.

When asked how the company or project could be more effective in its presentations, one third of the donors noted they would have liked to receive further updates about the progress of the

project. For example, one donor stated that she would be more apt to make subsequent donations if she were provided with ongoing progress reports and a basic “thank you.” A donor who traveled with Global Sojourns suggested that the local project might be provided with communication tools such as video camera and Internet access so that they could create their own promotional materials for donors. A certified financial planner who visited Nepal with Myths and Mountains suggested that “having a representative from the community project participate in fundraising and speaking engagements would add credibility and a direct connection to the projects. And they could also extend a personal invitation to potential donors to visit the project.”

- **When and How Did You Contribute?**

Those surveyed said that they made contributions in a variety of ways and at various times. Myths and Mountains adds a fixed amount for READ Global to the cost of the travel package, while other companies let travelers determine the amount they want to donate. Over half of those interviewed have made subsequent donations to the projects they first contributed to when traveling. Most donations were made after the trip and payable directly to the local project or to their nonprofit fiscal sponsor. Those who had traveled with Country Walkers said that the company “actually discourages direct donations during a trip” and instead provides a link to the local project through CREST’s Travelers’ Philanthropy website.



Giving Circle trip to southern Africa. Credit: Global Sojourns

Although both Giving Circles and READ Global websites both provide the ability to donate online, donors interviewed said that they prefer to donate by check. Global Sojourns’ Giving Circle offers an “annual membership,” with a suggested donation of \$1 per day. Two donors said they also make donations during the year as birthday or memorial gifts. In addition to financial donations, several Global Sojourns respondents said they also brought school supplies, mostly writing materials and books. Country Walkers sent tour participants ahead of time a list of supplies needed by the communities they would be visiting.

- **Approximately How Much Did You Contribute?**

Contributions among donors varied from over \$10,000 to under \$500 a year. The average annual donation of those surveyed was between \$1,000-\$2,000 per year.

My Role as a Guide in Promoting Travelers' Philanthropy

Juan Carlos Yanez
Guide, Country Walkers, Patacancha, Peru

Patacancha is an Andean community located at 13,700 ft. above sea level. It is predominantly a farming community and it is my home.

Road infrastructure is very limited here. That's why Patacancha villages are not yet significantly influenced by the outside world. Life is still much the way it was 500 years ago.

Education is a big problem in the countryside of Peru because we have limited access to modern schools, materials or techniques. Only 120 students go to school at Patacancha Primary. This represents 10 percent of the children who should be attending this school.



Patacancha women and children. Credit: Country Walkers

The distance to the school is an important reason why kids don't go to school. For instance, Alejandrina Cusi Yupanqui, a 10 year old girl, must walk 3 hours to school and 3.5 hours back every day.

Tourism guides like me can get guests interested in Peru and educate them about the specific real life problems faced by children in the countryside, such as lack of available education. I take my guests to see Alejandrina's school. We drive up to 14,100 feet, to Alejandrina's home, and we hike the same 3 hour route that she walks every day to school. Ironically, what for Alejandrina is an everyday walk is a holiday hike for us -- except that Alejandrina doesn't use walking sticks like our guests. And she wears sandals made out of recycled rubber tires instead of proper walking shoes.

After our 3 hour walk, we visit a local Patacancha home where some friends of mine (Saturnina and her family) allow the guests us to see how life happens indoors. It is a very gratifying experience to share a few moments with a local family who still speak the language of the Incas in their everyday activities.

We visit the Patacancha school that Alejandrina attends, and meet the principal, Mauro Crisostomo Masias Condori. He openly answers questions from our guests who at that point are very immersed in the needs of the community.



Trout Farm Inauguration, Patacancha.
Credit: Country Walkers

Mauro is a very talented teacher with a clear vision of what constitutes “real progress” in a community like Patacancha. He knows the challenges for the children of this area so he is able to convincingly explain to my guests the school’s real needs. For instance, we have learned that his students don’t consume enough iron in their diet which has a very important impact on the learning process.

He suggested that more children would attend school if they could be housed in dormitories because distance is such an obstacle. Living at the school would give many more Patacancha young people a better chance to get an education. From Mauro, we also learned that parents need to be persuaded that sending their kids to school is essential for development of both their futures and of Peruvian society.

After these experiences, we have a picnic lunch near Patacancha, with a bottle of wine on the table. So the day is not just about learning and fostering philanthropy. At this point guests are truly indulged by Country Walkers picnic style!



Students at Patacancha School, Peru.
Credit: Country Walker

How do we succeed in encouraging donations from our guests to support the school and the children of Patacancha?

- Before they depart, guests are informed by Country Walkers and the Trip Planner about our “giving back” program which identifies worthy community projects in the areas where we will be walking together. Travelers to Patacancha, are asked to bring school supplies with them from home. The donated supplies are given to the teachers.
- In the “Orientation meeting” at the start of the tour we prepare our guests so they are looking forward to visiting the school and being surrounded by Andean life.
- Over the next 3 days, guests learn of the successes and failures of Peruvian government projects in the Andean regions we are walking through.
- This way on day 4, guests are prepared for an “eye opening” experience.
- Getting into an Andean home and not creating a “touristy” environment is a key factor in the success of this process.
- Visiting the school and seeing the kids in a rather happy environment inspires guests to want to help. Because of the preparation they receive, guests understand that the Patacancha school is a key part of the vision for improved life in Andean communities.
- We encourage guests to learn more about our project by logging on to CREST’s Travelers’ Philanthropy site at www.travelersphilanthropy.com. This online donations site has solved our problems of delivering money for our school project securely and with minimum bank charges. In addition, CREST has a good reputation and provides an avenue for tax deductible donations.

Legal Issues: Incentives to Give⁵⁹

**Center for Responsible Travel (CREST) and
Keir Gumbs**

**Partner, Covington & Burling, LLP
Washington, DC**

The following is a summary of tax deductible policies in leading tourism countries. It was researched and assembled by CREST staff and interns based on government tax documents and other sources. The U.S. sections were reviewed by Keir Gumbs and other lawyers at Covington & Burling LLP. Further details and updates should be checked for each country.

1. How do I Make Sure my Donation is Tax Deductible?

Different countries offer incentives for citizens to make charitable contributions, and some offer the opportunity to deduct the value of donations from personal income taxes.

- **For U.S. Taxpayers⁶⁰**

For a United States taxpayer, a cash donation made to a U.S. charity that is registered under section 501(c)(3) of the Internal Revenue Code is generally deductible for U.S. federal income tax purposes if the donor itemizes his or her deductions. Donations made by a U.S. taxpayer to charities that are outside the U.S. generally may not be deducted. Some charitable projects abroad have established their own charitable organizations in the U.S. or partnered with existing U.S. charities or nonprofits -- like www.travelersphilanthropy.org -- for just this purpose. If the tax deduction is important to you, look for registered charities. In most cases, but particularly for any contribution of \$250 or more, donors should seek and retain a written acknowledgement of the contribution from the recipient organization.

- **For Canadian Taxpayers⁶¹**

Canadians wishing to receive tax deductions from their charitable donations should be sure to only donate to organizations which have been registered with the Charities Listings of the Canadian Revenue Agency (CRA). For a donation to qualify for a tax reduction, the donation (whether goods, property, securities, or other assets) should be fully transferred to one of the CRA's registered organizations, and the transfer must be made voluntarily.

Generally, Canadians cannot receive a tax reduction on their income tax for donations made to registered United States charities. However, if a donor has a source of income from the United States, he or she can claim the fair market value of any donations to United States charities that would be permitted on a U.S. return for up to 75 percent of the net U.S. income for the Canadian return.

⁵⁹ Several CREST staff and interns assisted with the research. The text was reviewed by several lawyers at Covington & Burling.

⁶⁰ *Charitable Contributions.*, Department of Treasury- Internal Revenue Service Pub 1771, (Rev. 3-2008) Catalogue number 20054Q.

⁶¹ Canada Revenue Agency. *Non-Profit Organizations*, <http://www.cra-arc.gc.ca/E/pub/tp/it496r/it496r-e.html>.

- **For UK Taxpayers**⁶²

In the UK, there are three main ways of donating that ensure tax-efficient contributions to a broad host of organizations. These methods include utilizing Gift Aid, a system that allows charities to gain extra money from taxpayers' contributions, donating directly from a paycheck or pension, or giving/selling assets to charity at no net personal profit.

Gift Aid is a service that expands donations by treating them as though the donor has already deducted the basic rate income tax (20 percent). Charities are then available to reclaim that tax from HM Revenue and Customs – thus allowing the initial donation to grow by 25 percent. Taxpayers that are eligible for Gift Aid are those who have (in that fiscal year) paid the same amount of Income/Capital Gains Tax as the amount of the basic rate tax that the charity attempts to reclaim on the donation. From there, a donor must fill out a Gift Aid declaration form. This form will cover all gifts the donor makes to the charity for whatever desired period. The declaration form should include the donor's full name, home address, the name of the charity, the details of the donation, and confirmation that it is a Gift Aid donation.⁶³

Payroll Giving allows employees or pension recipients to donate directly from these sources before any income tax can be deducted. The income tax is then applied only to the remainder of the individual's paycheck or pension – allowing them to receive immediate tax relief on their donation. Those individuals wishing to donate through Payroll Giving must meet the following requirements: that he or she is an employee and is paid weekly/monthly through PAYE (Pay as You Earn), and that his or her company/pension provider deducts tax through PAYE. In order to make a donation, the employee or pension recipient must authorize his or her company/provider to make the deduction. From there, the company/provider will pass that amount on to a Payroll Giving Agency that then delivers the gift to the selected charities.

Citizens of the United Kingdom can receive tax-relief by giving or selling assets (at less than their market value) to charities. Those assets which are applicable for tax-relief include shares listed or dealt on the United Kingdom's or another recognized stock exchange, units in an Authorized Unit Trust (AUT), shares in a United Kingdom Open-Ended Investment Company (OEIC), systems outside of the United Kingdom that are similar to AUT's and OEIC's, and other land and property in the UK. The donor should always contact the charity and confirm that it can/will accept his or her proposed donation. If the charity accepts and/or buys the donors assets, the donor can then calculate his or her tax deduction. If the asset was presented as a gift, then the donor should add the market value of the asset and any associated costs (such as legal fees). From there, the donor should deduct any value he or she (or any related persons) would receive as a result of the donation. This number is the amount of the deduction. If the donor sold the asset to the charity for less than the market value (a requirement for the transaction to be considered tax-deductible), the procedure for determining the deduction is the same as that for a gift, but the donor must also deduct the amount of money he received for the asset.

⁶² "480 Expenses and benefits, A tax guide," 2010, <http://www.hmrc.gov.uk/guidance/480.pdf>.

⁶³ "Directgov - Gift Aid, 2010," http://www.direct.gov.uk/en/MoneyTaxAndBenefits/ManagingMoney/GivingMoneyToCharity/DG_1001509.

- **For German Taxpayers**⁶⁴

A donor can receive tax-relief for donations of up to 20% of his or her annual taxable income. Such donations may be claimed as tax-exempt. Donations exceeding the limit above can be carried over into the following fiscal years.

For donations made in member countries of the European Union:

German citizens can receive a tax-deduction for donations made to organizations based in other nations that are members of the European Union. The receiving organization, however, must be acknowledged by the German government to be adequately benefitting the public before a tax-deduction can be confirmed. The German taxpayer should be given the opportunity to provide proof that the receiving organization pursues initiatives that would qualify it as an equivalent 'public-benefit' organization by the government of Germany.

For donations made in countries that are not members of the European Union:

The receiving international organization must be based in/have a receiving platform in Germany in order for donating taxpayers to receive a deduction on charitable donations.

- **For Australian Taxpayers**⁶⁵

Tax concessions may be claimed by the donor. This is the person, organization, company, trust or other type of tax payer that makes the gift. In order to claim a tax deduction, the donation must be made to what is known as a 'Deductible Gift Recipient' (DGR). These are the organizations that are endorsed by the Australian Taxation Office in their own right, or in relation to a particular fund. In order to claim a tax concession, your donation must 'truly be a gift'. That is, the donation must hold the following characteristics:

- there is a transfer of money or property
- they are made voluntarily
- the transfer arises by way of goodwill and good intention, and
- no material benefit or advantage is received by the donor.
- Money valued at AU\$2 or more.

- **For French Taxpayers**⁶⁶

French citizens are eligible for a form of tax-relief when they donate to charitable organizations. In order to receive a deduction on a tax bill, the individual must have donated before December 31st of the previous year. In France, tax relief as a result of philanthropic giving is determined according to a two-tier system.

The upper tier is composed of recognized organizations which feed, accommodate, provide medical and/or dental care, or otherwise assist people in need either in France or abroad. 75% of donations to organizations which have proven to pursue these causes can be deducted from an individual's annual tax bill. However the 75% only applies to the first 510 Euros of a donation;

⁶⁴ Bundesfinanzministerium Deutschland (German Ministry of Finance), www.bundesfinanzministerium.de.

⁶⁵ Australian Taxation Office (2010), *Making tax deductible donations*. <http://www.ato.gov.au/nonprofit>.

⁶⁶ CIC Tax System in France. <https://www.cic.fr/en/bank/personal-banking/settling-in-france/tax-system-in-france/index.html#l3>.

any additional value is deducted at a rate of 66% up to 20% of an individual's yearly taxable income.

The second tier includes recognized, non-profit organizations which are considered to be the French equivalents of English charities or have proven to benefit or stimulate the public – such as humanitarian, familial, religious, environmental, cultural, sportive, artistic, educational, scientific, or community-driven bodies. 66% of any donations made to organizations that have proven to pursue these causes can be deducted from an individual's yearly taxable income.

In these cases, donations include (but are not limited to) monetary donations from either vocational or investment-driven income, the allowance of a charity to use private property or premises, subscriptions to charities, and/or expenses incurred while volunteering at a charitable organization.

If an individual's gift exceeds the limits noted above, a donation may be carried over for deduction purposes for up to five years.

2. Is There a Tax Deduction for Donated Goods or Items?

- **For U.S. Taxpayers**

Yes. U.S. donors generally can deduct the fair market value of the donated item for federal income tax purposes, provided that the organization accepting the donation is going to use the property in carrying out its exempt activities. Fair market value is the price the item would sell for on the open market if it were sold in its current condition. Be sure to collect and retain documentation of your donation and any accompanying appraisals (required for donations of property other than marketable securities greater than \$5,000).

- **For Canadian Taxpayers**

Yes. If the fair market value cannot be easily determined, the donor and/or the receiving registered charity may need to have the property appraised to verify this value. In general, this is the amount of the tax deduction, provided that the donor receives no benefits as a result of his or her contribution. If such benefits are given, the donor must be sure to deduct their value from the fair market price of the assets or property to determine the modified tax deduction.

- **For UK Taxpayers**

As noted in the above section, UK citizens can receive a tax deduction for donated goods or assets. If the asset was presented as a gift, then the donor should add the market value of the asset and any associated costs (such as legal fees). From there, the donor should deduct any value he or she (or any related persons) would receive as a result of the donation. This number is the amount of the deduction. This form of tax-relief can only be claimed in the year that the gift was given. Donors should be sure to collect and keep share transfer documents, a certificate from the charity or organization which certifies that the assets have been transferred over to them, and any written requests from the organization to sell the goods or assets on its behalf.

- **For German Taxpayers**

Like U.S. citizens, Germans can also deduct the fair market value of donated item(s) from their income. However, these material donations must comply with the same rules and restrictions that have been established for monetary donations; i.e. tax relief is capped at 20% of an individual's annual taxable income (or equivalent), and donations must be made to organizations in Germany or in other E.U. member nations and must be approved by the German government, etc. Donors must also be sure to present appropriate documentation of their donations to the Ministry of Finance when necessary.

- **For Australian Taxpayers**

Yes. As in the case of donations of money, tax concessions are permitted in the case of donations made to a Deductible Gift Recipient. Once again, the donation of goods or items must 'truly be a gift'. In order to claim tax deductions on goods or items, the donation must be one of the following types:

- Property valued at more than AU\$5000 and must be owned by the donor for less than 12 months
- Shares that are valued at AU\$5000 or less at the time of donation and owned by the donor for less than 12 months
- Trading Stocks which are disposed of outside of the usual course of business
- Cultural Gifts, donated under the Cultural gifts program
- Heritage Gifts, which include places that are recognized in the National Heritage list, the Commonwealth Heritage list or the Register of the National Estate.

- **For French Taxpayers**

French citizens can receive a tax-deduction for the market value of property and items in good condition. The limits and percentage of deduction for these goods should correspond with the tier system as noted above. In order to ensure the deduction, donors should be sure to obtain valid documentation of the gift from the beneficiary organization.

3. Can I Deduct the Value of My Time Spent Volunteering?

- **For U.S. Taxpayers⁶⁷**

No. U.S. taxpayers may not deduct the value of time spent volunteering for purposes of federal income taxation. They may, however, deduct unreimbursed expenses incurred as a direct result of volunteering activities, but the expenses must be ones the charity would otherwise have to incur, not personal expenses of the volunteer. For example, volunteers may deduct the cost of materials they donate for use in repairs to a health clinic, or supplies they use in leading activities at a day care center. However, volunteers may not deduct personal expenses such as meals eaten during a break in a local service project, or transportation to and from a school where they donate their time.

⁶⁷ Conrad Teitell, *Tax Deductions for Volunteers*, 2007, <http://www.tgci.com/magazine/Tax%20Deductions%20for%20Volunteers.pdf>.

- **For Canadian Taxpayers**

Like the U.S., Canadian volunteers currently cannot deduct the cash value of time spent volunteering from their income taxes, but they can deduct out-of-pocket expenses directly related to volunteer work in exchange for the reimbursement of cash or a check. However, in order for the expenditures to become tax deductible, the volunteer/donor must provide the charity with a written statement expressing his or her desire for a donation receipt instead of reimbursement. At this point, the donation receipt is valid for deduction on the volunteer/donor's income tax.

- **For UK Taxpayers**

Citizens of the United Kingdom, similar to those of the United States, cannot claim a tax deduction for time spent volunteering but are capable of receiving tax relief for any expenses incurred as a direct result of volunteering activities – expenses that the charity would otherwise have to incur and/or expenses for which the charity did not reimburse the volunteer. Again, like the United States, these expenses must be directly related to the operations of the organization and the individual's work as a volunteer.

- **For German Taxpayers**

Taxpayers working on a voluntary basis can earn up to 500 tax-free Euros per year. The work must be part time and should not be the individual's primary source of income.

Taxpayers working on a voluntary basis in areas of child or adolescent skill development (such as coaching a sport or instructing art or music lessons) can earn up to 2,100 tax-free Euros per year. Again, this work must be part time and should not be the individual's primary source of income.

- **For Australian Taxpayers**

Volunteering is not considered a donation of goods (money or property) and therefore, the time spent volunteering is not considered a tax deductible item. However, any expenses incurred while volunteering for an organization that is listed as a Deductible Gift Recipient may be tax deductible. In this case, any expenses incurred are considered 'a gift' and should be consistent with those characteristics previously mentioned as tax deductible gifts.

- **For French Taxpayers**

French citizens, like those of several nations listed above, cannot claim a tax reduction for the cash-value of their time spent volunteering. They can, however, receive tax-relief for any necessary and unreimbursed expenses incurred while volunteering.

4. What Kind of Documentation Do I Need?

- **For U.S. Taxpayers**

For U.S. taxpayers, a donor cannot claim a tax deduction for any single contribution of \$250 or more unless the donor obtains a written acknowledgment of the contribution from the recipient organization. Donors should seek written acknowledgement that includes:

- a. the name of the organization a donation was made to,
- b. amount of cash contribution,
- c. description (but not the value) of non-cash contributions,
- d. a statement that no goods or services were provided by the organization in return for the contribution, if that was the case

It is not necessary to include either the donor's social security number or tax identification number on the acknowledgment.

For contributions of less than \$250 where the donor does not have a written acknowledgement from the charity, the donor must maintain a bank record (such as a cancelled check) as proof of the contribution.

- **For Canadian Taxpayers**

If the donor files tax returns electronically, he or she must keep official donation receipts from registered charities in the event that the Canadian Revenue Agency should ask to see them. If the donor files tax returns manually, he or she should submit donation receipts with their completed paperwork. Official donation receipts should indicate the eligible amount (fair market value) of the gift subtracted by the value of any benefits received in exchange for the donation. Donors are also encouraged to keep any documents related to their donation, including checks, pledge forms, and proof of payment.

- **For UK Taxpayers**

Because the UK methods of making charitable donations are often completed via organizations which are directly integrated with taxation offices such as Gift Aid and Payroll Giving, donors should keep careful records of their contributions but may not be required to present these records or other forms of documentation in order to receive a tax deduction. Payroll Giving yields an immediate tax deduction when it subtracts an individual's donation from his or her salary (and therefore decreases the amount to be taxed) before an income tax is calculated. Gift Aid works intimately with taxation offices, as a donor must meet certain annual tax requirements before a gift can be made. The necessary documentation for donation of assets has been included above, but, to reiterate, records of those transactions should include share transfer documents, a certificate from the charity or organization which certifies that the assets have been transferred over to them, and any written requests from the organization to sell the goods or assets on its behalf.

- **For German Taxpayers**

Donations up to 200 Euros require donation confirmations of either an accounting record or a cash deposit receipt. Donations exceeding 200 Euros require a donation receipt from the receiving organization.

- **For Australian Taxpayers**

Donors wishing to receive a tax deduction on donations made to Deductible Gift Recipients should ensure that they keep a record of all gifts made. This will be of use in lodging a tax return, and should be kept for 5 years in case of auditing. In the case of Property donations, additional valuations may be required and recorded. Any claims made cannot create a tax loss for the donor; however, claims may be spread over a period of up to 5 years. If this is the case, then additional documentation is required from the Australian Taxation Office.

- **For French Taxpayers**

Individuals wishing to receive a tax-deduction for their donation should be sure to obtain either a donation receipt or certificate to present to his or her local tax office. Taxpayers who declare online do not need to submit documentation, but should keep all record of donations in the event that proof is requested.

The discussion of the U.S. federal income tax treatment of charitable donations, which was reviewed by Covington & Burling LLP, is not intended to be, nor should it be construed to be, legal or tax advice to any particular person. Accordingly, you are urged to consult your own tax advisors with respect to the U.S. federal income tax treatment of charitable donations. Similarly, please be advised that the preceding information on other countries does not constitute legal advice and is not meant to provide a complete discussion of tax compliance issues. Please consult legal counsel if further assistance or a more detailed analysis is needed.

Chapter 7:

Conclusion

Lessons Learned and Best Practices

**By Martha Honey, Ph.D.
Co-Director, CREST**

The following is a summary of the main lessons and best practices, selected from the essays, surveys, and case studies in this *Handbook* and arranged as follows:

- ✓ Main Features of Travelers' Philanthropy Programs
- ✓ Businesses: Steps to Successful Travelers' Philanthropy
- ✓ Communities/Local Organizations: Steps to Successful Travelers' Philanthropy
- ✓ Travelers: Steps to Successful Travelers' Philanthropy
- ✓ Challenges and Trends

✓ **Main Features of Travelers' Philanthropy Programs**

Although their size, emphases, and methodologies may differ, travelers' philanthropy programs share a number of common features. All good programs have some or all of the following characteristics:

- Generate a new stream of cash, goods, and volunteer services beyond what is generated through the normal tourism business.
- Channel these resources into grassroots community and conservation initiatives.
- Promote face-to-face, authentic connections between people of different cultures.
- Engage travel businesses in supporting locally determined needs and projects at the destinations their clients visit.
- Establish new partnerships between local businesses and nonprofit organizations.
- Facilitate the involvement of local residents in decisions related to funding allocation and governance.
- Engage individual donors—the greatest single source of philanthropic dollars.
- Offer a new framework for constructive internationalism and global community-building, as well as cultural and environmental stewardship.
- Focus on destinations where the need for economic development and humanitarian assistance is high.

Travelers' philanthropy is a core component of responsible tourism. It contributes, more broadly, to a progressive development strategy by:

- Facilitating corporate engagement and good citizenship in tourism destinations.

- Enabling private action to address public needs.
- Supporting innovation and creating possibilities for social transformation.
- Generating social and environmental capital for conservation.
- Providing resources for social development.
- Mitigating the impact of state economic policy.
- Offering a cost-effective means of delivering social and conservation services.

The best examples of, travelers' philanthropy are the result of careful, cooperative planning, robust finance, business acumen, accountability, and a long-term perspective. In combination, these characteristics achieve lasting results.

Travelers' philanthropy is unique among funding sources because long-term donor support is built in. The visitors (potential philanthropists) are continually brought to the destination by tourism businesses. And if donors who provide support for the local project continue to be engaged after visiting the destination, the level of philanthropy can build over time, increasing community resources and making projects less likely to depend on tourism revenues alone.

Tourism-based initiatives tend to allow the time necessary for complex community projects to be completed in comparison to the deadlines set by government aid programs and foundations which demand swift implementation and reporting. Projects financed by travelers' philanthropy generally can conduct reasoned assessments of project outcomes based on project needs because they are organized by tourism businesses based or operating long-term in the destination.

✓ **Businesses: Steps to Successful Travelers' Philanthropy**

Today, all types of tourism businesses are involved in travelers' philanthropy, from individual lodgings in a single location to international companies supporting travelers' philanthropy programs around the globe, to collaborative efforts by multiple businesses to create destination-wide travel funds. Some travel companies have philanthropy or voluntourism as their central mission. And those involved in travelers' philanthropy include companies across the price spectrum, from backpackers to high-end luxury tours that are offering a wide range of activities from eco, nature, and adventure to coastal, marine, historic, cultural, and urban tourism. Typically, these companies make corporate donations, involve at least some staff, and educate and solicit contributions from their guests for specific community and/or conservation projects.

Successful travelers' philanthropy programs are carefully designed and built on consultations with the community and local organizations. They should include written agreements, staff training, communication materials, activities for visitors, and established protocols and procedures. The tourism business develops a tourism product that incorporates selected community projects as part of the visitors' experience -- and by doing so, creates unique and memorable holidays.

Businesses need to consider the following seven broad points when setting up a travelers' philanthropy programs:

- 1. Carefully design and build your program based on an assessment of the area**
 - a. Identify the geographic areas and issues you want to address through your travelers' philanthropy project.

- b. Learn about and engage with the community. Identify and consult key stakeholders; learn about their decision-making and governance practices. Maintain close and continual observation and engagement.
- c. Demonstrate good corporate leadership through positive interactions with the community.
- d. Develop and work from a list of potential projects that support community identified, needs-driven priorities rather giving “help” based solely on donors’ emotional reactions. Project success tends to be magnified (and more likely) when there is a clear baseline of community identified needs to provide a template for selecting projects.
- e. Weigh the pros and cons of supporting an existing NGO that has active projects versus developing your own project.
- f. Test your business’ readiness through a few selected short term projects. This demonstrates your company’s commitment as a social investor and helps you gauge local leadership and cultural dynamics.
- g. Identify or create a local foundation or other legal structure separate from the tourism business to receive contributions and run travelers’ philanthropy projects.
- h. Develop written agreements with the local organizations that will govern implementation of your program.

2. Analyze Your Company’s Commitment and Capacity

- a. Make travelers’ philanthropy an integral part of your company’s business plan and corporate social responsibility strategy, and not simply an add-on activity.
- b. Look at the problem or issue you want to address as a business challenge to which you will bring your management skills.
- c. Use your initial passion to fuel your travelers’ philanthropy project, inspire a commitment to excellence, and create enthusiasm that will encourage your colleagues and clients to join with you.
- d. Evaluate your company’s collective strengths and deficiencies with candor and care. Being a good business manager doesn’t necessarily mean you know about managing philanthropy and development assistance. What additional skills do you need and where can you get them?
- e. Set objectives and parameters for your project.
- f. Establish a clear set of principles and a policy for selecting projects and their expected deliverables.
- g. Be aware of the following issues when selecting projects:
 - o **Core competence:** To be successful, either your staff must have the relevant skills to undertake a project, or you must partner with an organization that can provide the necessary competencies.
 - o **Over-committed:** Over-commitment can create a “lose-lose” disaster rather than a “win-win” success: the donor loses money, the community loses faith, your company loses credibility with consumers and the community, and the problem remains unsolved. Your business as a project facilitator needs to be diligent and assess the internal resources carefully before committing to take money from donors and promise results to the community.
 - o **Spread too thin:** If those overseeing your travelers’ philanthropy program are too busy to pay sufficient attention to a project, it can sputter along with little drive and will deliver below its potential.

3. Create a Marketing Strategy

- a. Travelers' philanthropy can and should be integrated into your company's overall marketing effort.
- b. Position your program(s) as a company asset.
- c. Pre-trip, during the trip, and post-trip communications with your customers about the projects your company supports, and why, will increase the flow of donations.
- d. Promote your program and projects to the media, but avoid inflating impact.
- e. Use a variety of marketing tools to publicize your program, including websites, newsletters, blogs and other social networking, eco-awards, trade shows and conferences, special events, etc.

4. Organize "The Ask" – and Make It An "Offer"

- a. Develop an experiential product that leads travelers to care about the place and people, and then provide an opportunity for travelers to act on their caring.
- b. Guides and staff play an important role – they bond with travelers, can interpret local problems and needs, and carry the good name of your company. Invest in training them to introduce and promote your travelers' philanthropy initiatives.
- c. Enhance learning and giving through visitor experiences. Community tours, site visits, and/or meetings with key community or conservation leaders can lead to more informed and greater giving, but these interactions must be carefully planned and scheduled.
- d. Timing is important: don't wait until the trip is over to solicit donations.
- e. Offers appealing to the travelers' philanthropic intentions generate more donations than appeals focused primarily on incentives. But incentives (tax deductions, vouchers for future trips, matching funds, etc.) can play an important secondary role in decisions to give.
- f. Develop several methods for 'giving' and collecting funds.

5. Keep Donors in the Loop

- a. Donor engagement at the destination should be the start of a long-term relationship. Never stop communicating with your donors.
- b. Cultivating and maintaining a connection with the donors after they return home is a strong component of assuring sustainability of your program.
- c. Keeping in close touch with donors increases the likelihood of renewed funding. Develop a standardized and regularized – usually quarterly - reporting via donor newsletters and financial reports, and supplement this with social media and the web.
- d. Communicate to your donors how their support impacts the project they supported and how the project has transformed the community and environment.
- e. Use all types of reporting, including a "light" version – personalized reports for donors -- and a "heavy" version on project development with financial audits for foundations and donors who request more details.

6. Follow Sound Management Principles for Handling Donated Funds

- a. Determine where your program's funding will come from: the company, staff, travelers, foundations and grants, fundraising activities.
- b. Funds *should not* be deposited or held in a company account. Donations must be accounted for separately from the finances of your business.

- c. Funds can be given:
 - Directly to the project or local organization.
 - Via a local foundation your company helps to create.
 - To a foundation or NGO based in the donor's 'home' country (may be tax deductible).
 - Through an online service (may be tax deductible).
- d. Ensure transparency in how contributions are used, including regular auditing and reporting to donors.
- e. Remember these key principles for managing donated funds:
 - All fundraising activities are conducted with integrity, honesty, and openness.
 - The philanthropic goal must be put above personal gain.
 - Foster empowerment, self-determination, tolerance, and equal and fair treatment of all people.
 - Follow all applicable laws and regulations.
 - Ensure fairness, accountability, and transparency in all actions and activities.
 - Take care of your donors.
 - Measure success and effectiveness.

7. Ensure Ongoing Accountability

- a. Create mechanisms for financial sustainability through local income-generating activities and/or sources of revenue other than the travelers, including foundations, long term donors, fundraising events and activities.
- b. Engage in continual and honest assessment and evaluation, recognize and learn from mistakes, and strive for improvement.
- c. Institutionalize regular evaluations and financial audits.
- d. Celebrate the outcomes and communicate them clearly.

✓ Communities/ Local Organizations: Steps to Successful Travelers' Philanthropy

Increasingly, local NGOs, social service and environmental projects, parks, schools, medical facilities, and other destination-based organizations are looking to travelers' philanthropy programs to bring in needed financial and material contributions and/or volunteer labor and expertise. Done well, travelers' philanthropy brings real benefits to local projects and organizations while deepening traveler understanding of issues and inequities. As a result, travelers may be motivated to support a local project they encounter while on vacation in a sustained way over time.

However, not all local organizations or community projects have the capacity to interact effectively with travelers and travel companies. There are many factors that determine if a local project or organization is "tourism ready." One way for community activists to engage with potentially philanthropic visitors is by building a relationship with an established tourism business. Communities and local organizations interested in aligning with tourism businesses to create a travelers' philanthropy program should consider the following five points:

1. Assess What Organizational Needs Can Be Met From Tourism Contributions

- a. All recipient organizations view financial contributions as positive and vital to their operations.

- b. Some organizations and projects accept material donations and volunteers. Be sure to develop your own policy rather than waiting until the situation arises.
- c. All donations should be needs-driven, not donor-driven. In other words, determine what your community or local organization needs, then communicate and consult with the tourism company with which you intend to partner.
- d. Ensure there is “local ownership” of the project and that there is a high level of community engagement in and local support.
- e. Care must be taken to avoid local dependence on tourists to bring hand-outs and to ‘fix everything’ for the community or the project.

2. Assess Your Organizational Capacity to Manage a Travelers’ Philanthropy Program

- a. Train and dedicate staff to run the program.
- b. Negotiate terms and secure written agreements with travel companies who are sending visitors or funding.
- c. Develop a strategy and materials to inform travel companies and travelers about your activities.
- d. Administer contributions with transparency, oversight, and compliance with legal and financial regulations.
- e. Assist with an independent annual assessment and audits of donor-supported projects.
- f. Establish a system for reporting to donors (photos, website and written updates, audits, due diligence inspections by independent party, etc.).

3. Carefully Weigh the Pros and Cons of Site Visits

- a. Site visits have proven to be the most effective way of introducing visitors to your project or organization and generally increase the number and size of financial donations.
- b. However, they take time and resources, and in some cases, are not appropriate.
 - o Timing and frequency of site visits should be negotiated and pre-arranged to avoid disrupting the organization’s activities and allow for coordinated, well-staffed presentations.
 - o Visits should not feel ‘voyeuristic’ or uncomfortable for either visitors or locals.
 - o Some projects are by their nature not appropriate for site visits: clinics dealing with HIV/AIDS or other sensitive health issues, schools when classes are underway.
 - o Visits to child welfare projects must always be pre-arranged and have appropriate oversight. Brief visits often encourage a culture of dependency and teach children that looking cute for foreigners brings gifts or money.
 - o Extra sensitivity and planning are important when visiting projects in remote or ethnic minority communities. Guides and tour leaders should prepare visitors beforehand on what to expect and what is appropriate behavior.

4. Develop a Fundraising Strategy to Ensure Your Engagement with Travelers Brings Benefits to Your Organization.

- a. Unless a travel company is raising large sums for the organization, the company should cover the organization’s cost of hosting visits, including staff time, brochures,

refreshments, etc. This should be negotiated beforehand and may be either a fixed amount per visitor or lump sum for a group.

- b. Offer information to travelers and an opportunity to contribute during or after their visit. Experience will help you determine when is most appropriate to make “the ask” – or “the offer”.
- c. Offer multiple ways to accept donations, including on the spot, through the tour company, via a local foundation, online, or with a follow-up mailing.
- d. Explain to travelers how their donations will be used, with tangible examples.
- e. Travel companies can provide contributions in addition to donations from travelers through corporate and/or staff donations, incentives like matching visitor donations, offering travel vouchers to visitors who make larger donations, and facilitating tax deductions for contributions.
- f. Travelers are more willing to contribute if they have confidence in the tourism company and the company has a well-established relationship with your organization.
- g. Prepare a “wish list” of any material donations your organization would like travelers and volunteers to bring, as well as a list of things that should *not* be given.
- h. Make sure donations and supplies are given to a person in charge and not distributed by the visitors.

5. Determine if Volunteers Can Address Real Needs, and Carefully Weigh the Pros and Cons of Managing Them

- a. Volunteers take staff time and organizational resources to host and manage. Clearly designate a person(s) within your organization or project overseeing volunteer tourism (“voluntourism”) and managing their program.
- b. Voluntourism activities can run from a couple of hours to weeks, months or even one or more years. Carefully consider the length of stay sufficient to accomplish the specified tasks and produce sufficient benefits to your organization or project.
- c. Programs must be managed with the goal of creating financial sustainability. Organizations often require volunteers to cover their own expenses; some charge the volunteers for the experience. Foster commitments by volunteers to donate after they leave the project and become a channel for ongoing giving from the volunteer, friends, and family.
- d. Volunteers can be important teachers, transferring skills to local people and taking their enthusiasm and deeper understanding back to help teach others.
- e. Volunteer projects must be selected by and implemented with the local community or organization.
- f. Volunteers should not take jobs that local people could be hired to do.
- g. If you decide to use volunteers, prepare a written policy outlining for perspective volunteers the necessary skills, length of stay, financial obligations, and other requirements.
- h. Volunteers must be educated about what is culturally appropriate so they will avoid actions – even well intended ones -- that can have negative impacts. This should begin before the volunteer arrives and can be a shared responsibility with the tourism company or other recruiting agency.
- i. Carefully consider the appropriateness and benefits of particular tasks.
 - o Projects involving vulnerable populations – including orphans, school children, and HIV/AIDS patients – are especially sensitive.
 - o Short term volunteer postings with child welfare projects should be avoided because children need stability.

- Volunteers who work with children or other vulnerable populations must have background checks and be carefully monitored.
- Environmental projects – tree planting, wildlife population surveys, beach clean ups, etc.—are often most suitable for outside volunteers.
- j. Programs need to be continually monitored, re-evaluated, and revised to ensure real needs are being met for both the host community and volunteers.

✓ **Travelers: Steps to Successful Travelers' Philanthropy**

"Giving", writes Lars Lindkvist of the Basecamp Foundation, provides a deeper sense of belonging, both to people and to place and therefore travelers' philanthropy fulfills "a basic need." However, giving can also have unintended negative consequences, especially when it takes place across vast economic, cultural, geographic, and political divides.

The following are some of the important considerations for travelers who seek to "do good" by donating "time, talent or treasure":

1. Ethical action = Good intentions + Good consequences

- a. Good intentions can lead to unintended negative consequences.
 - As a visitor, you can be ill-informed or naïve about the local community.
 - Gifts may unbalance the status quo, generate resentments, and be sabotaged.
 - Avoid impulse giving; contribute to community priorities.
 - Identify (with the assistance of a trustworthy tourism business) and work with local organizations that have an established track record and legitimacy. It helps if the organization has been vetted by an outside NGO.
 - Recipients must take legal, financial, and psychological ownership of your donation.
 - Some donations should also include funds for maintenance.
- b. Donors should look for a project that meets the following checklist for ethical giving:
 - Project is needed and wanted by the local people.
 - Project's financial targets are clear and can be met through travelers' contributions.
 - Project will appeal to future tourists.
 - An agreement is reached before starting the project as to who will finance and administer maintenance and repair costs.
 - Funds are given to and administered by a locally acknowledged authority, who receives agreed upon compensation for this service.

2. For Those Considering Bringing or Sending Material Goods or Supplies

- a. Do not donate goods and supplies unless the organization specifically requests them. Travel companies should request that organizations they are supporting create a "wish list" for travelers and volunteers to bring.
- b. Many material donations are of questionable or even negative value. They may not be culturally appropriate or what is really needed, could be purchased locally, may undermine local industries and retail businesses (clothing, book publishing), may require costly or constant repairs or maintenance, and may incur import duties and other taxes, handling and transport costs.

3. For Those Considering Voluntourism, Understand the Complexities and the Pros and Cons

- a. Volunteering can be a deeply inspirational and educational experience for the volunteer – often more personally satisfying than giving material or financial donations.
- b. Be honest with yourself about your motives and how much tourism and how much volunteering you want to do.
- c. Carefully assess whether the living and working conditions are acceptable.
- d. Determine what you like to do and what skills you can offer.
- e. Determine how much money you can spend on a voluntourism trip.
- f. Consider any potential negative consequences of a volunteer project. For example, is the time you can commit sufficient to be beneficial to the host organization? Would you be doing work that could be done by employing locals? Might it risk creating a culture of dependency on outsiders?
- g. Consider if you might be able to raise the money to pay a local resident to do the work you were planning to do for free
- h. Make arrangements through a well-established and experienced tourism company or volunteer organization.
- i. Thoroughly check out the credentials of the local organization, including contacting past volunteers and organizations specializing in placing volunteers.
- j. Be prepared to make a commitment as a longer term supporter of the organization or project. This includes teaching others in your home community about the organization and providing ongoing contributions personally and/or from your network of family, friends, and colleagues to support its work.

✓ Challenges and Trends in Travelers' Philanthropy

Over the last two decades, the principles and good practices of ecotourism, which were pioneered primarily by small lodges scattered around the globe, have been adapted and incorporated into the operations of larger hotels, resorts, international tour operators, restaurant chains, transport companies, and other sectors of the mainstream tourism industry. Similarly, travelers' philanthropy began through scattered and isolated experiments by owners and managers of tourism businesses – the proverbial Good Samaritans – who had an ear to the ground and responded to local needs and requests for help. Today, travelers' philanthropy has been embraced by many larger businesses and is widely recognized as a core component of corporate social responsibility and responsible travel. Increasingly, bilateral and international development agencies, including USAID, the Inter-American Development Bank, and the World Bank, are viewing travelers' philanthropy as a component of tourism-based poverty alleviation and rural development work.

One challenge, however, is how to keep travelers' philanthropy grounded in supporting local community and conservation needs in the far flung destinations around the globe, rather than simply becoming a funnel for loose change from travelers into the large traditional charities like the Red Cross. Not that these multi-national charities aren't deserving, but they have developed enormous capacities for raising funds. By its very nature, tourism has a unique opportunity and capacity to raise funds for pressing needs in those beautiful, vulnerable, marginalized, and often forgotten places on earth.

As travelers' philanthropy grows and matures, another challenge is how to deepen, enrich, and

embolden the concept so that it becomes an effective tool for social empowerment and sustainable development. One of the most important developments has been the growing recognition that travelers' philanthropy should not be based on a top down or charity model in which the traveler or tourism company decides what and when to give. Rather, to be effective, it must be a needs-based model with the local community or organization "taking ownership" of the giving process, setting the priorities and selecting the projects to be supported. Travel companies play a role, of course, but community organizations need to be the primary drivers in any philanthropy-based development initiatives.

Another development is to move, in some locations, from the model of individual tourism businesses establishing their own travelers' philanthropy programs to tourism businesses within a location collectively a building destination-wide travelers' philanthropy fund. All travel businesses who are part of the fund then promote and help raise contributions for the same suite of projects. This model is probably best suitable for destinations with active and engaged local communities and a clear, positive image in the tourism market. The organization IGTOA was one of the first to adopt this approach, organizing under a single umbrella many of the tour operators in the Galapagos. Today the concept of creating a destination-wide fund is being piloted in both Monteverde and the Osa Peninsula in Costa Rica, and is being considered elsewhere.

Finally, Lars Lindkvist provides seven key words and their underlying concepts that can be used, as he writes, "to give ourselves some preferred direction as to where we are heading with travelers' philanthropy." They are:

1. **Complexity:** Recognize Complexity before Generality.
2. **Partnership:** Aim for Partnership before Individual.
3. **Investment:** Consider Investment before Charity.
4. **Sustainable Change:** Prepare for Sustainable Change before Status Quo.
5. **Proactive:** Be Proactive before Reactive.
6. **Long Term:** Think Long-term before Event.
7. **Professional:** Balance Professional against Interest.

Lars' concludes his essay – and we conclude this *Handbook* – with the hope that these key words become more than simply buzz words. Rather, when put together they can provide some guidance for the future of travelers' philanthropy:

"We travel in recognition of the complexity in the societies and environments we visit and seek to locally support sustainable change by proactive investments in long-term professional partnership projects."

Additional Resources

The following are a sampling of the growing number of resources available in the field of travelers' philanthropy and voluntourism.

- **CREST's Publications and Films**

Available from Center for Responsible Travel (CREST) and Travelers' Philanthropy:
www.responsibletravel.org and www.travelersphilanthropy.org

- CREST, *Dos and Don'ts of Travel Giving*, 2009. Free on website; Hard copy: \$5
- CREST, "Travelers' Philanthropy: Helping Communities Build Economic Assets and Sustain Environmental and Cultural Resources in an Era of Rapid Globalization", Travelers' Philanthropy White Paper, January 2004. Free on website.
- Honey, Martha, editor, *Travelers' Philanthropy Handbook*, published by CREST, February 2011. Free on website; CD-Rom: \$15; Hard copy: \$25.
- Honey, Martha and Raymond Gilpin, "Tourism in the Developing World: Promoting Peace and Reducing Poverty," Special Report, United States Institute of Peace, October 2009. Free on website.
- Music, Charlene and Peter Jordan, "Travelers' Philanthropy: Giving Time, Talent, and Treasure," 30 minute documentary video, December 2008. Available in English and Spanish versions. DVD: \$15.
- "Travelers' Philanthropy Conference Proceedings," 1st International Travelers' Philanthropy Conference, Stanford University, Palo Alto, California, April 2004. CD-Rom: \$15.
- "Travelers' Philanthropy Conference Proceedings," 2nd International Travelers' Philanthropy Conference, Arusha, Tanzania, December 2008. CD-Rom: \$15.
- "Travelers' Philanthropy Conference Proceedings," 3rd International Travelers' Philanthropy Conference, San Jose and Monteverde, Costa Rica, July 2011. Available following the conference. CD-Rom: \$15.
- Wolff, Johanna, "Results of Travelers' Philanthropy Survey", a summary of key findings in "Travelers' Philanthropy: analyzed on the basis of the willingness to give donations to safari tourism in Tanzania," Masters' Thesis, October 12, 2009, Sustainable Tourism Management, University of Applied Sciences Eberswalde, Germany. Free on website.

- **Other Publications**

- Goodwin, Harold, Lucy McCombes, and Claudia Eckhardt, "Advances in Travel Philanthropy: Raising money through the travel and tourism industry for charitable purposes," commissioned by World Travel Mart and presented at WTM Responsible Tourism Dave Report 2, November 2009. Available from International Center for Responsible Tourism (ICRT).
- Goodwin, Harold, ICRT and Claudia Eckardt, Cinnamon Tourism Consulting, Ltd, "Travel Philanthropy Report," World Travel Mart, London, 2008. Available from International Center for Responsible Travel (ICRT).
- McGehee, Nancy, "Resident Attitudes Towards Voluntourism: Perceived Impacts of Voluntourism," <http://www.voluntourism.org/news-studyandresearch21.htm>.

Sustainable Travel International (STI), "Best Practices in Travel Philanthropy Manual: Tour Operator Sector", Vol. 1, December 2008.
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Wearing, Stephen. Volunteer Tourism Experiences That Make a Difference. Wallingford, Oxon: CABI, 2001. Print.
Xola, *Emerging Best Practices in Adventure Tourism and Volunteering*, 2007, www.xolaconsulting.com.

- **Organizations**

Association of Voluntary Service Organizations: www.avso.org

Based in Belgium, this association provides information about voluntary service organizations which send and host volunteers in Europe for periods of 6-12 months.

Center for Responsible Travel (CREST) and Travelers' Philanthropy program: www.responsibletravel.org; www.travelersphilanthropy.org

CREST functions as a bi-coastal institute, offering innovative programs, conferences, publications, courses, and field research opportunities. Its Travelers' Philanthropy program provides field research and studies, publications and videos, expert training and courses, project development, conferences and other resources to strengthen and broaden travelers' philanthropy projects around the world.

Generosity in Action: www.generosityinaction.org

Generosity in Action provides a structure for travelers to support local villages and people. Coordination with tour operators and tour leaders insure that donations are properly applied to the projects intended.

Global Vision International: www.gviusa.com

Provides support to international charities, non-profits and governmental agencies through volunteering opportunities, internship programs and direct funding.

GlobalGiving: www.globalgiving.com

Global giving offers donors a transparent, high-impact giving experience. You choose where you want your money to go, and we get it there, quickly and efficiently.

JustGive: <https://www.justgive.org>

Creates comprehensive tools and services to make charitable giving a part of everyday life, JustGive is a nonprofit organization whose mission is to increase charitable giving by connecting people with the charities and causes they care most about. JustGive has harnessed the power of the Internet to remove barriers to charitable giving.

International Centre for Responsible Tourism: <http://www.icrtourism.org/>

ICRT is a postgraduate teaching and research centre at Leeds Metropolitan University with just less than 100 blended learning students pursuing our MSc in Responsible Tourism Management and ten doctoral students.

International Volunteer Programs Association: www.volunteerinternational.org

IVPA is a membership association made up of non-governmental organizations involved in providing volunteer opportunities for travelers.

Nurturelakeland: <http://www.nurturelakeland.org>

Nurturelakeland helps make the Cumbrian tourism industry sustainable by creating ways for businesses and individuals to donate to conservation.

The Travel Foundation, UK: <http://www.thetravelfoundation.org.uk>

We are an independent UK charity which helps the travel industry understand, manage and take effective action on sustainable tourism.

Tourism Cares: <http://www.tourismcares.org>

Tourism Cares seeks to preserve the travel experience for future generations through awarding grants to natural, cultural and historic sites worldwide.

Stay Another Day: www.stayanotherday.org

Travelers can select from a variety of travel opportunities that give back to the communities they wish to visit. With a current focus in Southeast Asia, Stay Another Day encourages travelers to “stay a bit longer and experience more...”

Sustainable Travel International: www.sustainabletravelinternational.org

STI's Travelers Giving Back program solicits online donations for over 500 grassroots charity projects around the world. By allocating 90 percent of each contribution to these projects, STI helps protect the environment and encourage community self-reliance.

Via International: www.viainternational.org

This is a 501(c)3 service organization based in California. Dedicated to building "paths to self-reliance for an interdependent world," programs are designed to improve quality of life through nutrition and ecology training, community leadership education and microcredit and microenterprise support. Voluntours programs offer educational travel and service learning opportunities to engage with community development initiatives. Via International also sponsors the VolunTourism.org website.

VolunTourism: www.voluntourism.org

VolunTourism provides travelers and travel operators with a variety of voluntary service experiences that include travel to destinations around the globe. VolunTourism helps travelers select an appropriate service program and then guides them through their trip preparation. Following their three-pronged mission – “To Educate, To Empower, and To Engage” – VolunTourism also provides visitors with access to a variety of sustainable tourism resources.

- **E-Information Sources and Blogs:**

Fly for Good: flyforgood.com

This website provides free space to non-profits to showcase their volunteer programs. Fly for Good is also the provider of the new “International Volunteer Card” which is the “first card of its kind to combine travel insurance, 24-Emergency Travel Assistance, and exclusive discounts from 10-50% on major international and national retailers, airlines, and travel providers.” This is similar to the international student card but not limited to students.

Idealist: www.idealists.org

As a project of Action Without Borders, this site serves as a clearinghouse for volunteer resources, information sharing and opportunities related to volunteer travel.

In the Know Traveler: www.intheknowtraveler.com

This is a general travel website which is written by first-hand travelers. The site features a list of voluntourism experiences.

SAVE Travel Alliance: www.save-travel.org

Representing the SAVE market (scientific, academic, volunteer and educational tourism), The SAVE Alliance is non-profit “network of networks” that facilitates linkages between potential or developing tourism destinations and attractions, and the appropriate SAVE markets.

Transitions Abroad: www.transitionsabroad.com/listings/work/volunteer/index.shtml

This volunteer portion of Transitions Abroad website focuses on providing information about volunteering abroad for various age groups.

Travel Philanthropy: www.travaid.org

This is an on-line resource that allows travelers to channel money to projects in need. TP does not conduct its own projects but serves as a conduit to existing initiatives in the UK and overseas.

Travelers’ Philanthropy: www.travelersphilanthropy.org

This offers a one stop shop for information about travelers’ philanthropy, including a online giving portal which provides tax deductibility to donations to specific projects listed on the site.

Volunteer Abroad: www.volunteerabroad.com

As a sub-site of goabroad.com, this site serves as an information source for those looking for international volunteer experiences.

Volunteer Beat on Travel Beat: www.travelbeat.net/volunteer/

London-based blog that discusses volunteer trips.

Volunteer Logue: www.volunteerlogue.com/

This is an on-line volunteer travel guide blog where bloggers discuss new volunteer trips, areas for more information and other volunteer travel related resources.

VolunTourism: www.voluntourism.org

This site serves as a clearinghouse about voluntourism including information for providers, media, researchers and travelers. The site also offers a free e-newsletter for the volunteer tourism trade.

Biographies of Authors

Not included here are the case study writers. Their contact information is at the end of each case study.

David Abernethy, Ph.D., is a Professor Emeritus of Political Science at Stanford University in Palo Alto, California. His teaching and research interests have focused on sub-Saharan African politics, European colonialism and anti-colonial nationalism, and the development and relief work of non-governmental organizations in poor countries. He is author of *The Dynamics of Global Dominance: European Overseas Empires, 1415-1980* (Yale, 2000). Dr. Abernethy has been the faculty lecturer on several trips to Africa and Asia sponsored by the Stanford Alumni Association's Travel/Study Program and on a Bushtracks Expeditions trip around the Sahara. Email: dba@stanford.edu

Andrew Bill, Andrew Bill has worked in the travel industry throughout his 30-year career, first as a journalist for publications on both sides of the Atlantic and, since 1990, as the CEO of Siera Marketing, based in New York. Clients include tourist boards, multinational companies, individual resorts, tour operators, and the media. For the last five years, he has been a board member of CREST (Center for Responsible Travel), with special focus on the Center's travelers' philanthropy program (travelersphilanthropy.org). E-mail: Andrew@sieramarketing.com

Whitney Cooper, M.Sc. worked as the Program Associate for Center for Responsible Travel from 2007- mid-2010. She helped coordinate the 2008 Travelers' Philanthropy Conference in Arusha, Tanzania and consulted on CREST's Travelers' Philanthropy program. Her desire for "giving back" started with an internship in Honduras helping to develop ecotourism programs in National Parks with local Garifuna tribes. Currently she works in energy efficiency continuing her passion for social and environmental sustainability by creating "green jobs." Email: whitcooper@gmail.com

Jane Crouch

Jane is the Responsible Travel Manager for Intrepid Travel, based out of Melbourne, Australia. Intrepid Travel operates affordable small group adventures, currently in more than 100 countries around the globe. Jane works to foster best practice in responsible travel throughout Intrepid's operations and helps steer Intrepid's sustainability strategies, carbon reduction and neutrality program and community support. Jane has had 25 years involvement with several international NGOs, established The Intrepid Foundation in 2002 and recently completed a Graduate Diploma in International Development. Jane has also been active in the development of sustainable tourism in the young nation of Timor-Leste. Email: jane.crouch@intrepidtravel.com

Jessie Davie is an independent consultant currently living and working in Arusha, Tanzania. She grew up in Maine and earned her Bachelor's degree at St. Lawrence University in New York, and her Master's degree in Environmental Studies from the University of Montana. Jessie has worked and volunteered in both east and west Africa—volunteering at a primary school in eastern Ghana and leading community service student travel trips to Tanzania. More recently she has been involved in institutional sustainability work, gender rights and resource management initiatives, and climate change mitigation programs. Email: JessieDavie@gmail.com

Keir Gumbs is CREST's legal counsel and a partner with Covington & Burling LLP in Washington, DC. He advises public and private companies, non-profit organizations, institutional investors and other clients in corporate, corporate governance, securities regulation and transactional matters. Keir is a frequent author and speaker on matters affecting public companies, including topics such as shareholder proposals, the proxy rules, corporate governance, SEC rulemaking and other matters. He is a graduate of the University of Pennsylvania Law School.
Email: kgumbs@cov.com

Sam Ham, Ph.D. is Director of the Center for International Training and Outreach and Professor of communication psychology in the University of Idaho's Department of Conservation Social Sciences, Moscow, Idaho. Sam's work has focused on applying communication theory to sustainable development, interpretation and travelers' philanthropy throughout the United States and in 44 other countries. He is author of *Environmental Interpretation*, the world's leading text on applied interpretation, and 350 other publications. Sam's training in applied communication has reached more than 43,000 people worldwide. Sam conducted the audience research and developed the strategic communication campaign that resulted in a 270% increase in guest donations to Lindblad Expedition's "Galapagos Conservation Fund," in Ecuador. Today, the fund annually generates more than \$400,000 for conservation and local community development.
Email: sham@uidaho.edu

Martha Honey, PH.D., is co-founder and Co-Director of CREST and heads the Washington, DC office. She has written and lectured widely on ecotourism, travelers' philanthropy, and certification issues. Her books include *Ecotourism and Sustainable Development: Who Owns Paradise?* (Island Press, 1999 and 2008) and *Ecotourism and Certification: Setting Standards in Practice* (Island Press, 2002). She is working on a book on the impacts of coastal and marine tourism. Martha worked for 20 years as a journalist based in East Africa and Central America and holds a Ph.D. in African history. She was Executive Director of The International Ecotourism Society (TIES) from 2003 to 2006.
Email: mhoney@responsibletravel.org

Judy Kepher-Gona is a specialist on Ecotourism with over ten years experience in ecotourism, most of which were spent at the helm of Kenya's national ecotourism society, Ecotourism Kenya. She is credited with initiation, development and implementation of Africa's premier and most successful sustainable tourism certification program, the ESOK Eco-rating scheme. She is an international speaker and has served in many local and international committees working to create a better understanding of ecotourism. Judy joined Basecamp Foundation in 2008 and is today the CEO overseeing Basecamp Explorer's tourism supported projects in Masai Mara and Lamu in Kenya and Rajasthan in India. Basecamp Masai Mara is a showcase of sustainable tourism and has won many prestigious local and international ecotourism awards.
Email: judy@basecampfoundation.org

Kristin Lamoureux, Ph.D. is a faculty member and Director of the International Institute of Tourism (IITS) within the Business School at the George Washington University (GWU). She specializes in niche tourism such as ecotourism, adventure, and volunteer tourism. She also specializes in international development through sustainable tourism. She currently oversees all IITS projects including serving as the GWU liaison to the USAID Global Sustainable Tourism Alliance. Kristin completed her Ph.D. in Business Administration/Strategic Management at GWU with a focus in volunteer tourism partnerships in federal lands.
Email: klam@gwu.edu

Lars Lindkvist, Ph.D., is director of Basecamp Explorer, an aspiring global leading ecotourism provider with several tourism awards from its network of destinations in Africa, India, Europe and the Arctic. Lars is also CEO of the Basecamp Foundation. Born in Sweden, he holds a PhD in Biogeography, specializing in environmental sustainability and development issues in Africa and India. His first international assignment was in Africa with the Swedish Aid and Development Agency (SIDA). Following the posting in Africa, Dr Lindkvist engaged in Biological and Geographical Research at the Earth Science Centre at Gothenburg University. During the past 10 years Lars has developed an award winning pragmatic concept within sustainable tourism, which has been implemented at Basecamp destinations. Basecamp provides a global tourism approach that sustain communities, support local development, drives conservation and is long-term profitable.

Email: lars@basecampexplorer.com

Priscilla Macy, M.A., is President of Global Sojourns which she established in 1997. After receiving her Masters in International Development, working with small businesses in Kenya and Zimbabwe, and spending three years conducting cultural anthropological research in Mozambique, Priscilla experiences and interests catalyzed to inspire her to form a unique travel company. Instead of positioning Global Sojourns as an educational travel company, she decided to cater to adventure travelers and weave in opportunities for clients to “go deeper” in their understanding of the people and places they visit. In 2007 she started the Global Sojourns’ Giving Circle in response to her clients’ and her personal desire to “give back” to sub-Saharan Africa. The GS Giving Circle helps to improve the lives of children, especially girls, in sub-Saharan Africa. She currently lives in Washington D.C. with her husband, Peter.

Email: macy@globalsojourns.com

Wangari Maathai, Ph.D. is founder and leader of the Green Belt Movement and the 2004 Nobel Peace Laureate. Since 1977 Dr. Maathai has been organizing rural Kenyan women to plant trees in an effort to help combat deforestation, soil erosion, and water shortages. The Green Belt Movement has planted over 40 million trees and has become a leading force in Kenya’s pro-democracy struggles as well as a model for similar initiatives in other developing countries. Professor Maathai serves on the boards of several organizations including the UN Secretary General’s Advisory Board on Disarmament, The Jane Goodall Institute, Women and Environment Development Organization (WEDO), World Learning for International Development, Green Cross International, Environment Liaison Center International, the WorldWIDE Network of Women in Environmental Work and National Council of Women of Kenya.

Green Belt Movement: <http://www.greenbeltmovement.org/>

Marina Novelli, Ph.D., is a Principal Lecturer in Tourism Development & Management, Centre for Tourism Policy Studies, School of Service Management, at the University of Brighton in UK. With a background in economics and human geography, her research is broadly in the field of international tourism planning and development, with a specific focus on niche tourism, travel philanthropy, capacity building, community-based and pro-poor tourism approaches. She sees her mission as generating new knowledge about ways in which tourism can play a key role in stimulating local economies, conserving the environment, and developing peoples and changing lives.

Email: M.novelli@brighton.ac.uk

Daniela Ruby Papi is the founding director of a hybrid social venture, PEPY which offers education programs in rural Cambodia. PEPY’s tagline “Adventurous Living, Responsible

Giving” highlights the dual mission of the organization: to offer tours that expose travelers to development issues and empower them to become more educated donors and to fund and implement development programs that improve access to quality education in rural Cambodia. Driven by a young group of social entrepreneurs, PEPY in the past five years has grown from a one-off bike ride that funded the construction of a rural school to working in over 10 schools and employing over 40 local staff. PEPY Tours has won the National Geographic Geotourism Challenge Award as well as Notre Dame’s Social Venture Business Plan Competition, among other honors. Daniela, a graduate of the University of Notre Dame, has lived and worked in Asia for the past eight years, and is currently based in Siem Reap, Cambodia.
Email: d@pepyride.org.

Mark J. Spalding, President of The Ocean Foundation, concurrently serves as the Executive Director of the St. Kitts Foundation and the Fundación Bahía de Loreto A.C. Both of these subsidiary foundations are the philanthropy arms of sustainable resort developments. Mark has also served as a consultant to Rancho La Puerta spa/resort and its foundation regarding the conservation of the Tecate River Valley, and as an advisor to Kerzner International Limited to assist its formation of the Kerzner Marine Foundation. He is the co-author of the North American Commission for Environmental Cooperation’s study on ecotourism, and conducted green hotel evaluations in India. Mark chairs the Council of the (U.S.) National Whale Conservation Fund, and is an active member of the marine working group, Baja California group, and coral reef group of the funders’ organization, the Consultative Group on Biological Diversity. He has served as a member of the Environmental Grants Advisory Committee of FINCOMUN (Tijuana’s Community Foundation). He was a professor of international law and policy at University of California at San Diego’s Graduate School of International Relations and Pacific Studies for 10 years before bringing his extensive experience with the legal and policy aspects of ocean conservation to The Ocean Foundation’s grantmaking strategy, evaluation process, and development of sustainability standards for coastal development.
Email: mspalding@oceanfdn.org

Jill Talladay is an independent consultant who advises for-profit business and non-profit organizations in New England on the promotion of special travel and tourism projects and community relations development. She helps organizations like the Massachusetts Lodging Association and a variety of attractions in the region establish community partnerships, raise funds for grants and scholarships, generate consumer awareness, and increase membership. Jill’s knowledge with the travel and tourism industry runs deep, as she spent twenty five years in the travel trade press with Spirit of Massachusetts Guidebook and as was the Corporate and New England Sales Director for Group Tour Magazine. Beyond her paid work, Jill is a committed volunteer and has served on numerous boards including as president of Single Volunteers of Cape Cod and the Cape Cod Hospitality Marketing Association.
Email: talladayj@aol.com

Sandra Tassel is the President of Look at the Land, a conservation consulting firm based outside of Washington DC. In her consulting work, she assists local and state governments, nonprofit organizations, and advocates for natural resource protection to develop and implement conservation strategies and programs. Ecotourism is often an element of her projects, especially in Latin America where she has advised community groups, businesses, and NGO’s on markets, communications, business plans, guide training and tourism product development. Tassel is the author of *The Conservation Program Handbook*, published by Island Press in 2009.
Email: sjtassel@earthlink.net

David (Jonah) Western, Ph.D., is founder and chairman of the African Conservation Centre in Nairobi. He is also the former director of the Kenya Wildlife Service and the first board chair of The International Ecotourism Society (TIES). A Kenya citizen, he was raised and educated in Tanzania, obtained a B.Sc. (Hons.) from Leicester University and a Ph.D. from the University of Nairobi. His research and writing has centered on the local people, parks and tourism.
Email: jonahwestern@adelphia.net, dwestern@africaonline.co.ke

Johanna Wolff holds a M.A. in Sustainable Tourism Management from the University of Applied Sciences Eberswalde, Germany. Born and raised in Berlin, in 2009 she conducted field research for her M.A. thesis into the travelers' philanthropy activities of tour operators in Arusha, Tanzania. This research formed the basis for her essay contributed to the *Handbook*. She also worked as an intern with CREST in 2010. Her other work experience includes with the Goethe-Institute in Addis Ababa, Ethiopia in 2005 and the German National Tourist Office Sydney in Australia in 2008.
Email: johanna.wolff@hotmail.de

Juan Carlos Yáñez is a certified professional tour guide and has been leading tours in the Andes for many years. Trained in his mother city of Cusco, Juan Carlos enjoys sharing his vast knowledge and love for his ancestral culture; evident from his enthusiastic smile and warm sense of humor. When not guiding, Juan Carlos spends time researching the Peruvian Andes with his father and mentor, also a well-known tour guide. Juan Carlos' experience, dedication, and enthusiasm make him a true trailblazer. His passion for world travel is matched by his leadership skills and his dedication to discovering and sharing the wonders, subtleties, and hidden treasures of his home country, Peru.
Email: jcyanezch@hotmail.com



About Center for Responsible Travel

The Center for Responsible Travel (CREST) - formerly the Center on Ecotourism and Sustainable Development (CESD) - is a unique non-profit organization devoted to increasing the positive global impact of responsible tourism. CREST functions as a bi-coastal institute, with offices in Washington, DC and at Stanford University in California. It collaborates with experts and institutes around the world. CREST's international network provides interdisciplinary analysis and innovative solutions through consultancies, research, field projects, publications, video documentaries, conferences, and courses. Recognizing responsible tourism's potential as a tool for poverty alleviation and biodiversity conservation, CREST's mission is to use policy-oriented research to design, monitor, evaluate, and promote sustainable practices and principles within the tourism industry.

The Center was founded in 2003 by two pioneers in the field of ecotourism who saw a critical need for providing intellectual rigor to the responsible and ecotourism movements. Dr. William Durham, professor of Anthropology at Stanford University, and Dr. Martha Honey, author and then-director of The International Ecotourism Society (TIES), met at a Stanford event, agreed on the need for a new approach, and launched CREST shortly thereafter.

CREST's programs, research, field projects, publications, courses, and documentaries have included impacts of coastal tourism and residential developments, cruise tourism impacts on ports-of-call, indigenous rights and tourism, 'green' certification programs for tourism businesses, travelers' philanthropy, market research on tourism trends and consumer demand, tools for financing sustainable tourism projects, cost benefit analysis of different types of tourism, and identifying and promoting innovative and replicable models of sustainable tourism.

CREST views responsible tourism as a development and conservation tool that has the potential to address some of the most complex and compelling social and natural conservation issues of our times. Among the questions CREST addresses through its programs, research, and field projects are:

- How can tourism destinations grow in ways that meet the needs of today's citizens without endangering the ability of future generations to meet their own needs?
- How can we build national tourism programs as well as individual tourism businesses that are environmentally responsible, socially beneficial, and profitable?
- How can we decrease the negative social and environmental impacts of tourism?
- How can tourism truly contribute to the survival of endangered flora and fauna?
- How can tourism help to empower local communities and alleviate poverty?
- How can tourism facilitate cross-cultural learning, while diminishing the exploitation of host populations?

As we strive to develop policy tools for addressing these questions, our vision is to *transform the way the world travels*.

Website: www.responsibletravel.org

Washington, DC ■ 1333 H St., NW ■ Suite 300 East Tower ■ Washington, DC 20005 ■ P: 202-347-9203 ■ F: 202-775-0819
Stanford University ■ 450 Serra Mall, Building 50, Room 51D ■ Stanford, CA 94305 ■ P: 650-723-0894 ■ F: 650-725-0605



CREST's Travelers' Philanthropy Program

Since 2003, the Center for Responsible Travel (CREST, formerly Center on Ecotourism and Sustainable Development) has developed Travelers' Philanthropy into a signature program. As an independent organization based at Stanford University and in Washington, DC, and with tourism business and institute partners around the globe, CREST is ideally positioned to provide expertise, educational and promotional materials, research, networking and shared learning, capacity building and training, and global branding for travelers' philanthropy initiatives.

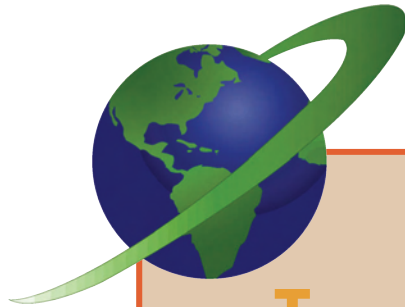
Our unique approach to travelers' philanthropy has five broad objectives: 1) to provide tourism businesses with tools and training to undertake effective community and conservation 'give back' initiatives, 2) to help local NGOs and community-based projects determine how and when to engage with tourism businesses and tourists; 3) to raise the profile of travelers' philanthropy with the media, public, travel industry, governments, foundations, and development agencies; 4) to convert travelers' spur-of-the-moment giving into on-going substantive support, and 5) to develop 'best practices' and 'rules of engagement' for travel companies, travelers, and communities involved in travelers' philanthropy and volunteering projects.

CREST's Travelers' Philanthropy Program is innovative because:

- It partners directly with tourism businesses to assist them in their community and conservation initiatives.
- It brands these initiatives under one umbrella, with a common logo, educational and promotional materials, and dedicated website (www.travelersphilanthropy.org).
- This one-stop-shop website includes a portal accepting tax deductible donations for local projects supported by our partner tour companies.
- It has produced the first ever documentary on travelers' philanthropy ("Giving Time, Talent and Treasure").
- It has created, together with Basecamp Foundation, a 5-hour 'short course' on the 'nuts and bolts' of travelers' philanthropy.
- It has organized the only international conferences held on travelers' philanthropy (Costa Rica/2011, Arusha, Tanzania/2008 and Stanford University, USA/2004).
- It has created an Experts Bureau of people prepared to assist tourism companies, community organizations, and others in initiating, strengthening, assessing, and expanding travelers' philanthropy projects.
- It has created the *Travelers' Philanthropy Handbook*, the first ever comprehensive, practical guide to the history, theory, and practice of travelers' philanthropy. .
- And because CREST recognizes the downsides to philanthropy done badly, it has produced the "Dos and Don'ts of Travel Giving," and a set of 'best practices', and other tools for tourism businesses, communities and visitors involved in travelers' philanthropy.

Website: www.travelersphilanthropy.org

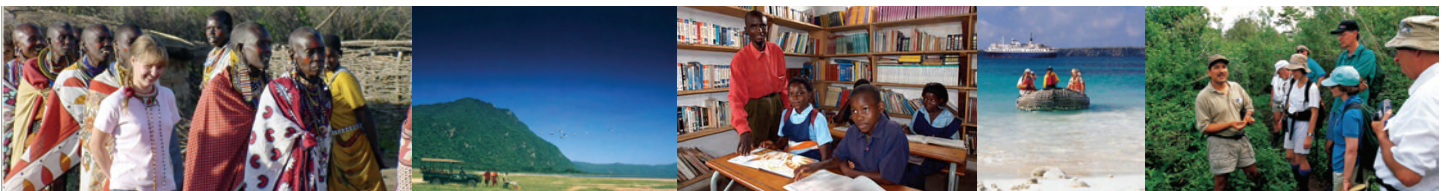
Washington, DC ■ 1333 H St., NW ■ Suite 300 East Tower ■ Washington, DC 20005 ■ P: 202-347-9203 ■ F: 202-775-0819
Stanford University ■ 450 Serra Mall, Building 50, Room 51D ■ Stanford, CA 94305 ■ P: 650-723-0894 ■ F: 650-725-0605



Travelers' Philanthropy: Dos and Don'ts of Travel Giving



A project of the Center for Responsible Travel



Travelers' Philanthropy: Dos and Don'ts of Travel Giving

Travelers' desire to help, interact, and learn from those they meet during their holiday is clearly positive. However, there are sometimes unintended consequences from these good intentions. Misguided contributions can perpetuate cycles of dependency, cause corruption, burden communities with unwanted or inappropriate donations, and require recipients to spend time and resources to handle 'gifts' they didn't request or cannot use.

As part of our Travelers' Philanthropy program, the Center for Responsible Travel asked a dozen experienced tour operators and tourism organizations who are engaged in supporting local community projects how they respond to some of the most frequently asked questions and suggestions from travelers about 'giving' while on holiday. Though they sometimes expressed differing views, overall they agree that when, how, and what to contribute needs to be decided by the host community, not the tourist or the tourism company.

Below is a summary of their responses. It is intended to highlight some of the complexities behind donation and help build a more enlightened traveling public. It's also intended to assist tourism businesses in crafting appropriate ways to harness the goodwill and generosity of their guests while meeting genuine needs in the host communities. A more in-depth summary of the responses to this survey, as well as a condensed "bookmark" version is available online at: www.travelersphilanthropy.org



Schoolchildren in Tibetan Children's Village, Dharamsala, India

When visitors suggest:

"I want to help build or finance a school/ a water well."

Experts respond:

"It is important that guests who wish to make a contribution to local communities do not simply impose their own will on such communities. The community should be consulted and involved."

"Contributing to a significant initiative like this, where needed, could be great. But to ensure your support is most effective and sustainable long term, we recommend that you contribute through an established non-government organization (NGO), which specializes in this area and has a history of effective results."

"Offering financial assistance towards a project is the most beneficial way of making a difference as a guest. Projects to be supported through guest donations emerge from many hours of negotiation and consultation [between the tourism company's social development practitioners and the community]. The project must be built on a basis of trust – a valuable and often unrecognized quality in achieving success and positive, lasting impact. This encourages 'partnership' and allows for ownership of the project to emerge. It removes the critical risk of creating dependency on help coming from the outside."

"Projects that are identified by guests disempower communities. Projects 'given' are not owned by communities. And the sustainability of the project will be compromised."



Fund a Water Well in Cambodia through GoPhilanthropic and Journeys within Our Community



When visitors suggest:

“Let’s send books.”

Experts respond:

“If this is an identified need that has emerged from consultation and can be routed through the development practitioner, then great. But as a principle, all donations of *product* are very tough to apply without creating dependency.”

“In 90% of cases, people send books in English, which is not helpful.”

“Purchasing books in a local language is an effective way to ensure a donation will be used well.”

“It’s important to buy locally to support the local economy and get books that are appropriate.”

“If you are thinking of sending books, first consider:

Is the shipping cost, customs fees and port taxes on arrival and further transport to the destination going to outweigh the value of the books?

Do you have a person on the ground who can ensure they clear customs and reach their destination?

In what state are the books? If they are outdated, damaged or irrelevant, they will just add to a trash problem.

Is the information culturally relevant and useful? A rural school in the tropics without electricity doesn’t need books on microwave cooking or ice-skating.”

“An alternative would be to sell your used books and donate the money to a program that purchases new books for schools and libraries in developing countries.”

Positive Approach:

Myths & Mountains

READ Global Program, Nepal & India

In partnership with rural Himalayan villages, READ establishes library-community centers that grow into hubs of education and enterprise and act as catalysts for economic and social development for these communities.



Global Village Foundation, GoPhilanthropic, Vietnam



When visitors suggest:

“Let’s visit an orphanage, school, or health clinic.”

Experts respond:

“Great – more than welcome to – though make sure your intention is not to stand at arms length and ogle, to engage in ‘poverty tourism.’ Do not bring your binoculars, and ensure that respectful leadership is provided by a local person. Ensure that you carry the energy of a visitor, not as someone who possesses power over another because of the material things you have.”

“Visits should only be undertaken with prior arrangement through your tour operator or through a local person in appropriate authority who can arrange a suitably managed opportunity.”

“Children are not pets. Orphanages are not zoos. Unless the visitor is giving a skill to a place, interacting with kids needs to be monitored and shouldn’t be happening on a regular basis.”

“We only allow this if there’s some sort of contribution the guests are making to the orphanage and the children, and it’s not just going and looking.”



Global Village Foundation,
GoPhilanthropic, Vietnam

Positive Approach: Micato Safari’s AmericaShare project educates visitors about the HIV/AIDS epidemic and provides support for affected women and children, in the form of school sponsorship programs, shelters, and community centers.

“We endeavor to prepare our guests not only about the wildlife in Africa but about *life* in Africa. After providing them with a rich background on politics, culture and social structures in Africa, we take our guests to see the projects of our non-profit arm, AmericaShare. After a visit, many guests are moved to help. And through AmericaShare’s programs, they can.”

Dennis Pinto, Managing Director, Micato Safaris, New York



AmericaShare Project,
Kenya

When visitors suggest:

"Let's send used clothing."



Youth with donated clothing, Basecamp Explorer, Kenya

Experts respond:

"Such efforts are very thoughtful and generous, but they often are counterproductive when you consider logistical concerns such as shipping, customs duties, pilferage and delivery of the clothes. It is frequently better to buy and donate inexpensive clothing at the destination."

"Clothing should only be sent if requested and truly needed. Please check with a suitable organization working in the destination community, as to the specifics of what they require. Your tour operator may be able to suggest appropriate organizations. If you are able to hand carry in appropriate clothing, this can be helpful."

"Find out specifically what type of clothing, gender, sizes and ages are most needed. Be aware of what is culturally acceptable and suitable dress — i.e., you should not send skimpy women's clothing to a conservative country. Never send secondhand underpants for both reasons of hygiene and dignity."

"It sends a subtle message that because a community is materially poor, it is open to receiving second-hand goods. As a principle, second-hand goods are a mechanism for removing self-respect and dignity. They are useful only in a context of emergency relief situations."

When visitors ask:

"Should we bring school supplies to hand out?"

Experts respond:

"It's contingent on what kind of structured relationships the tour company has with local communities and what community priorities are. What must be avoided is 'donor' driven support that does not fit community priorities. Gifts such as school supplies, computers, and clothing can be more harmful than beneficial if not given in the context of a mutually beneficial relationship."

"Don't 'hand out' anything. That will only encourage a situation where it becomes more profitable to hang around tourists than go to school or work. If there is an existing relationship with an organization that has needs, buy supplies from the local economy. The only exception to this is certain items that are unavailable or very expensive to buy locally."

"They should be given to a head teacher or principal who arranges their distribution at a suitable time, for instance, at the beginning of term or as incentives for achievement. They should not be handed by you directly to students because this can encourage a perception that 'foreigners come and give you stuff' because you are poor. This can accentuate the unequal relationship between visitors and locals, as well as encourage begging."

When visitors suggest:

"Let's start a penpal program with a local school."

Experts respond:

"They are difficult to manage very well and have lots of variables to deal with. Is the rural family even used to getting mail? Do they have access to stamps? Does the mail system work?"

"Is there a teacher who is excited about it and wants this program? Are the children already learning English? Is there an existing relationship with a school? The most important thing to consider is whether someone is ready to maintain the program on the other end."

"Better to send to a class so that if one person doesn't get a letter they won't feel left out."



Nature Kids Foundation, Nature Air, Costa Rica



When visitors inquire:

"Can we visit a village or home?"

Experts respond:

"These are best pre-arranged through your tour operator or local friends at a time that is agreeable with the local community or household."

"We facilitate visits through the community-based programs with whom we have links. These are established community-based programs who know how to handle visitations and can control for quality and cleanliness."



Home visit, Basecamp Explorer, Dharamsala, India

"If the villages have set up the program, and visitation benefits the community, then that is alright. Also, if a guide has built a relationship with one of the guests and wants to invite them to his home, that is fine as well. But just as it would be inappropriate to drop in on people unannounced at your home, you should not just stop in at a village without having a relationship or an invitation."



Patacancha Community Project, Country Walkers, Peru

"Use local guides – this is key because through them, you develop trust with a community and before you know it, you're welcomed into a home."



Kids in Pak Beng, Laos, Intrepid Travel

Positive Approach: Intrepid Travel

Sarawak, Malaysia

Intrepid Travel groups regularly stay in an Iban community-built and run longhouse in Sarawak. A rotational arrangement is in place with the men who transport visitors in their boats to the longhouse and with the women who prepare meals. Visitors sleep in a common area with all families contributing mattresses. The result is that the workload and income of hosting visitors is shared. The best way that travelers can give back in this community is through shared interactions during the stay and by purchasing handicrafts. During one of the evenings of the homestay, all the families display a selection of their handicrafts in the communal area. Travelers can buy items at fixed price directly from the maker.

Lake Baikal, Siberia, Russia

Intrepid uses a selection of homestays with Buryat families, the indigenous people of Lake Baikal in Siberia. They also employ one of the family members as a local guide for this region. Buryats were discriminated against during the Soviet period, due to their religious beliefs (Shamanism and Buddhism). Now there is something of a cultural revival, and Intrepid groups are able to help promote an interest in local Buryat culture.

When visitors suggest:

"I'd like to volunteer for a week following my vacation. What suggestions do you have?"

Experts respond:

"My experience with international volunteers is that they need 6 months to do something significant."

"For some people it would be ideal for them to volunteer for an afternoon, but I haven't found anything that is as good for community as for the traveler."

"I would not support an organization that would let any volunteer in to play with their kids for a day or two. When it comes to kids, there needs to be security and consistency. Volunteers should have a background check and training. There needs to be a real curriculum and a commitment of 6 months to a year, not a new foreigner every day."

"Volunteer programs require specific skills and capacity to manage. Too often volunteers appear in, say, a child's life and as the relationship deepens and connections are formed, the volunteer leaves."

"Volunteer activities must be appropriate. Too often volunteers are brought in to paint a school or build a house and on leaving the paint peels off and the walls must be rebuilt."

"It cannot be stressed enough – volunteers, unless properly managed, are fundamental drivers of disempowerment of and disowning of projects by communities. All interventions should be approached with caution and respect."



A traveler volunteers time and talent
Global Sojourns, Sub-Saharan Africa

When visitors suggest:

"Let's take computers and set up a computer lab."

Experts respond:

"Depends on where. Is it in a town? What is the availability of servicing? Does the school need them?"

"Did somebody ask for a lab? Do they have a teacher? Do they have electricity?"

"There is no point in giving a printer to a school that cannot afford printer cartridges or giving computers without appropriate software."

"Do not use poor communities as a dumping ground for redundant equipment."



Yachana Technical High School,
Yachana Foundation, Ecuador
©Frank Sánchez

When visitors ask:

"Should I bring small gifts (pens, trinkets, candy, or other items) to give to local children?"

Experts respond:

"Definitely not candy – responsible for radical rise in tooth decay in communities around Mara and Serengeti [in East Africa]."

"My recommendation is not to. I've seen many communities where children start flocking around tourists because they can get candy. Better to give something meaningful to an institution."

"Well meaning gifts outside of a relationship result in loss of dignity to both sides."

"In many cultures it is tradition to bring a gift as a gesture of gratitude for hospitality such as when you are a guest in someone's home. This may take the form of a small useful household item, a souvenir of your country, or food such as fresh fruit. But generally we would advise against giving items directly to children, particularly if you are just engaging with them for a short time."

"Indiscriminate giving by tourists can actually lead to children skipping school or being encouraged by their parents to take to the streets and beg. Do not give candy or sweets as in many communities there is inadequate dental care and malnutrition."

WARNING

Please **DO NOT** give candy (sweets) to the Maasai children. They are unprotected without fluorides, toothbrushes, painkillers and dentists. Abscessed teeth and chronic pains are often treated by Maasai elders without anesthesia.

TOURISTS WHO GIVE SWEETS ARE CAUSING MAJOR TOOTH DECAY AND SUFFERING !

Dr. raymond S. Damazo - Director, world Health Dental Org.

Sign posted on an East African tourism truck, courtesy of Jane Crouch

When visitors ask:

"Should I give anything (money, food, etc.) to street beggars?"

Experts respond:

"This question is a tough one. We usually say to our visitors that its best to support organizations that work directly with beggars or street kids, or educational and capacity building programs that assist people so they won't end up on street."

"Giving gifts in an arbitrary way often turns the people in a destination into beggars, who see Western travelers only as people who give them things."

"Giving directly to an individual can give you an immediate feeling of pleasure or pride, but consider whether you are really helping or purchasing gratitude. It can be difficult to refrain from giving to what appears to be really needy cases – such is our human nature. It is good to get local advice on what welfare services there are, particularly supporting people with disabilities and the elderly. If begging is their only option for survival then you may choose to give."

When visitors ask:

“Should I help local children earn a bit of money by letting them carry bags or serve as my guide?”

Experts respond:

“No, those children should be in school! Instead, travelers should support community initiatives that are working to get the children off the street and into school.”

“It’s okay to do so if it is part of a structured relationship or agreement.”

“Depends on the situation. Always consult local tour guides first to see what is the right thing to do in that area.”

Positive Approach:

Juan Carlos [Yanez] is exemplary of a local guide who is truly invested in a community-based project. He was a key figure in establishing the Patacancha Dormitory Project which provides housing and educational infrastructure for Peruvian students who would otherwise face an unmanageable daily commute to school. Juan Carlos is an excellent ambassador for Patacancha, regularly bringing travelers to the community and even inspiring them to contribute donations.”

Sonya Bradley, Responsible Tourism Program, Country Walkers

When visitors ask:

“What do I do when I take a photograph of someone and they ask me for money in return?”

Experts respond:

The advice of those surveyed is:

- Ask in advance.
- If you have already taken the photo, and they demand payment, pay.
- If you ask beforehand, and they require payment, only pay if it is an official transaction and a fair price.

“I don’t think it’s an appropriate transaction to take a photo of someone and then give them money in return because it may feed into the handout problem.”

“It is important to interact with the person first and always ask their permission before photographing or videoing. If they ask for money beforehand, which is their prerogative, consider what it is worth to you and negotiate a fair price, or do not take the picture. If they ask for money after they agreed to be photographed and you have taken the picture, then offer what you think is appropriate. By approaching people in a friendly communicative manner they are more likely to be agreeable and allow you a memorable photo.”

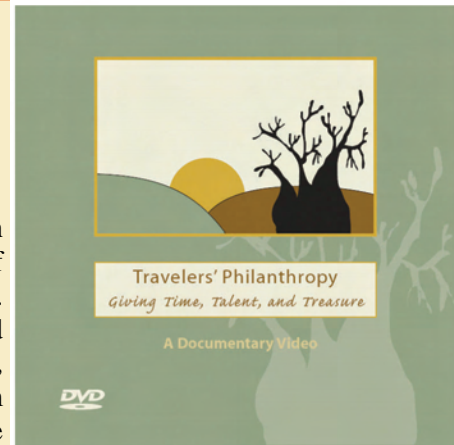


Traveler interacts with local children, Intrepid Travel, India

"Giving Time, Talent and Treasure"

The first ever documentary on Travelers' Philanthropy

This 25 minute film examines the challenges inherent in successful philanthropic projects and showcases examples of Travelers' Philanthropy in Costa Rica, Tanzania and Kenya. It includes interviews with experts, tourism operators and community leaders. This impressive documentary was shot, edited, and produced by two talented young filmmakers from Stanford University, Peter Jordan and Charlene Music. We are grateful to ProParques and Basecamp Foundation for underwriting the production cost.



To preview a clip of the film, go to:
<http://www.travelersphilanthropy.org/resources/film.shtml>



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Conference proceedings are available and include clips and transcripts from keynote speeches as well as all presentations from panel speakers.

www.travelersphilanthropyconference.org

Tourism Enterprises: Grow your impact!

Increase benefits for the community-based projects you support by joining the Travelers' Philanthropy network.

For more information on how to become a partner organization, visit:

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To purchase a copy of the film (US \$15) or
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please contact:

Whitney Cooper
wcooper@responsibletravel.org
(202) 347-9203 ext. 414

This is the first of a series of publications that will be collected into the forthcoming Travelers' Philanthropy Handbook to be released at the World Travel Market in London in November 2009.

Those who gave us answers and insights for this survey are:

&Beyond (Les Carlisle)

www.andbeyondafrica.com

The African Safari Lodge Foundation (Sandra Mombelli)

www.asl-foundation.org

Country Walkers (Sonya Bradley)

www.countrywalkers.com

Dorobo Safaris (Daudi Peterson)

Global Exchange-Reality Tours (Malia Everette)

www.globalexchange.org

Global Sojourns (Priscilla Macy)

www.globalsojourns.com

GoPhilanthropic (Lydia Dean)

www.gophilanthropic.com

Holbrook Travel (Andrea Holbrook)

www.holbrooktravel.com

Intrepid Travel (Jane Crouch)

www.intrepidtravel.com

Micato Safaris (Dennis Pinto)

www.micato.com

READ Global (Carol Erickson)

www.readglobal.org

Pepy Tours (Daniella Papi)

www.pepytours.com



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A more in-depth summary of the responses to this survey as well as a condensed "bookmark" version is available online at: www.travelersphilanthropy.org. We invite your additions and suggestions as well. Please send to: Idriscoll@responsibletravel.org



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Center for Responsible Travel

Washington, DC Office

1333 H St. NW,
Suite 300, East Tower
Washington, DC 20005
Tel: 202-347-9203

Stanford Office

450 Serra Mall
Building 50 Room 51D,
Stanford, CA 94305
Tel: 650-723-0894

Email: staff@responsibletravel.org

Websites: www.travelersphilanthropy.org & www.responsibletravel.org



OPERATOR SELF CHECK GUIDE



Volunteer Tourism Effective Practices is designed for tour operators who are looking to or already incorporating volunteer projects into their trips. Additionally, we hope it will also serve development organizations, volunteer tourism participants and community members in helping to identify and engage in great volunteer projects. We gathered research, input and experience from many people working in the areas of voluntourism, development, and traveler's philanthropy to create this guideline and are grateful for those who have contributed their input. This is a working, living resource, meaning that we are continually seeking feedback in the form of opinions, experiences, lessons learned and anecdotes relating to the outlined effective practices, and responses to the design and content of this guideline.

Many thanks for using this tool to help improve your work in voluntourism, for passing this on to others who might find it helpful, and for contacting us with feedback or ideas for improvement.

Happy Reading,

Karina Kloos (Head Researcher and PEPY Volunteer), Daniela Papi (PEPY Tours Founder), and The PEPY Team



voluntourism@pepytours.com
+1-914-458-4262
www.pepytours.com

PARTNER ORGANIZATIONS AND HOST COMMUNITIES



1. Responsibly identify partner organization

This section is intended to help tour operators identify volunteer project partners (NGO, nonprofit, social venture). For tour operators organizing and offering their own volunteer projects directly to participants, the same indicators and questions apply with regard to the projects and host community relations.

INDICATORS	VALUES		EVIDENCE	NEXT STEP
Locally Run Community Programs				
- Are project leaders based locally?	YES	NO		
- Are project leaders working in close collaboration with the local community?	YES	NO		
- Are project leaders familiar with the region: local businesses, organizations, government officials; customs, traditions, and laws?	YES	NO		
Community Buy-In				
- Was the volunteer project/ community interaction designed in consultation with the community based on community interests and needs?	YES	NO		
- Does the project have the ongoing support and involvement of the community?	YES	NO		
Long-Term Program Sustainability				
- Does the partner organization have a stable relationship with the community?	YES	NO		
- Can the partner organization be relied upon throughout the planning and implementation of the project involved?	YES	NO		
- Is the project geared toward building capacity within the community to manage its own long-term development?	YES	NO		
- Was the volunteer project/ community interaction designed to further progress on a larger goal, which existed before volunteers arrive and will continue after they leave?	YES	NO		

PARTNER ORGANIZATIONS AND HOST COMMUNITIES



1. Responsibly identify partner organization

INDICATORS	VALUES		EVIDENCE	NEXT STEP
Corruption Mitigation				
- Has the partner organization developed relationships with community members?	YES	NO		
- Has the partner organization set up a monitoring and evaluation system, which involves checks and balances as well as outsider input and assessment?	YES	NO		
- Does the partner organization have a deep understanding of local customs and laws?	YES	NO		
- Do project leaders speak the local language? If there are select beneficiaries (certain members or families within a community, or one community rather than another) of the program, is the selection criteria transparent?	YES	NO		
Documentation and Reporting Structures				
- Can the partner organization demonstrate reliable documentation, measurement and reporting about their organizational operations?	YES	NO		
Is the partner organization legally registered in the areas in which they work?	YES	NO		
- Are they actively measuring and reporting the short- and long-term effects of their projects?	YES	NO		
- Are the financial reports of the organization transparent, both annual and project-specific reports?	YES	NO		
- Is the partner organization willing to openly discuss the use of the program budget?	YES	NO		
Ethos and Ethical Alignment				
- Do you share the social, environmental, and development values of the partnering organization?	YES	NO		
- Do you have a similar philosophical approach towards community development, and ecological / heritage preservation?	YES	NO		
- Do you share the same project goals?	YES	NO		
- Is there clear discussion and understanding of any cultural or organizational differences?	YES	NO		
- Have you consulted references from your own sources (not only sources provided by the partner), to better understand perceptions and impacts of the partnering organization?	YES	NO		

PARTNER ORGANIZATIONS AND HOST COMMUNITIES



2. Build relationships based on collaborative project management and assessment with the partner organization

The impact volunteer tourism trips have on the volunteers and host communities will depend largely on the partnership between the organization and tour operator. Miscommunication, misunderstandings and any problems that exist could potentially undermine the efforts of everyone involved and so it is important to think of how best to manage the communication and responsibilities of the organizers.

INDICATORS	VALUES		EVIDENCE	NEXT STEP
Project Monitoring and Assessment				
- Are there communication channels in place for any project updates or changes?	YES	NO		
- Are there monitoring structures in place to evaluate volunteer impact and the capacity to make any necessary adjustments?	YES	NO		
Project Follow Through				
- Are there clear expectations of how long the tour operator will provide volunteer support and how that aligns with the expected duration of the project needs?	YES	NO		
- Are there built-in protections in the volunteer projects design against unpredictable fluctuations in the number of volunteer participants? (how might a decline in tourism affect the outcome of the project?)	YES	NO		
Volunteer Planning				
- Is it clear who is responsible for providing to volunteers any necessary pre-trip information regarding the issues the volunteer project addresses, the volunteer project itself the partner organization and the host community?	YES	NO		
- Is the partner organization provided with information about volunteers?	YES	NO		
- Is it clear who is responsible for any follow up information or activities with volunteers?	YES	NO		
Memorandum of Understanding				
- Have you developed a clear understanding of responsibilities and expectations for both organizations?	YES	NO		
- Do you have in place structures for continual assessment and re-evaluation of partnership relations, project goals, volunteer experiences and community impact?	YES	NO		
- Do you have documentation of all agreements?	YES	NO		

PARTNER ORGANIZATIONS AND HOST COMMUNITIES

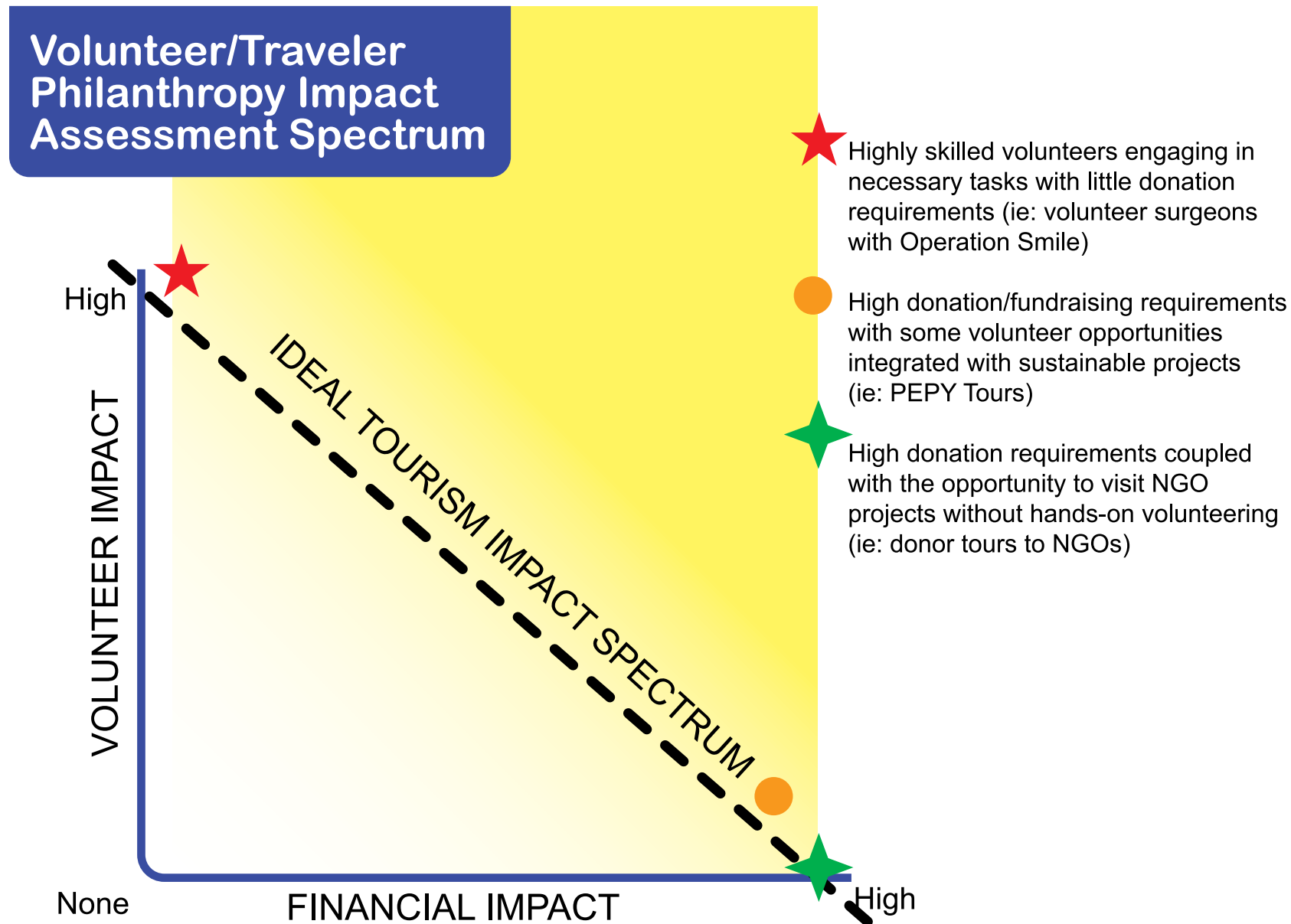


3. Ensure beneficial relationship for partner organization and host community

With increasing interest in volunteer tourism, there are increasing demands on tour companies to incorporate volunteer projects in their tours. Tour operators “and volunteers” should keep in mind how their efforts are actually contributing to the needs of the recipient organization and community.

INDICATORS	VALUES		EVIDENCE	NEXT STEP
Volunteer Contribution				
- Do volunteers provide valuable services to the organization and community? (Some questions to consider: Do volunteers provide locally unavailable skilled labor? Do volunteers provide services that would otherwise be costly for partner organizations? Are volunteers taking the place of local jobs?)	YES	NO		
- Does volunteer participation in the project contribute negatively to the local environment?	YES	NO		
- Is volunteer participation culturally appropriate?	YES	NO		
- Will the volunteer be employed in a position, which will create dependence or create a void when the volunteer leaves? Alternatively, will their position build the capacity of local people and programs to better sustain themselves once the volunteer is gone? (For example, is the volunteer teaching English directly to children? Or teaching teachers how to improve their English thereby providing capacity building to the teachers?)	YES	NO		
Financial Contribution				
- Might the financial contribution be more effective than volunteers?	YES	NO		
- Are the financial costs of hosting volunteers considered?	YES	NO		
- Would a financial contribution help to sustain ongoing project needs?	YES	NO		
- Would a financial contribution potentially create any dependencies?	YES	NO		

A helpful visual analysis to consider:



Please note, the author would like to point out that the impact of those in the first group (Operation Smile) could have even higher impact if their skilled tasks also included training local doctors to perform the operations once they leave.

VOLUNTEER PROJECTS



4. Design projects based on local needs and input as well as volunteer sustainability

Again, the increasing demands on tour companies to incorporate volunteer projects in their tours can potentially lead to poorly designed projects that cater to volunteers' interests rather than – and sometimes at the expense of – the needs of the host organization and community. This section is intended to help ensure that projects are designed on a needs basis.

INDICATORS	VALUES		EVIDENCE	NEXT STEP
Project Planning and Design				
- Is a representative from the partner organization and/or community involved in all steps of the volunteer project planning and implementation?	YES	NO		
- Is the community directly contributing to the project in any way? Did beneficiaries have to earn these contributions in some way?	YES	NO		
- Does the short-term project contribute to the long-term goals and needs of the organization and community?	YES	NO		
- Are volunteer projects adaptable? ie: if project timelines or community needs change, can the volunteer project be altered to meet the new demands?	YES	NO		
- Are projects adaptable to changing tourism trends? ie: might the project discontinue if tourism declines in that area?	YES	NO		
Volunteer Contributions				
- Are volunteers' skills appropriately matched to the projects' needs and activities?	YES	NO		
- Are there valuable tasks accessible for non-technical or "unskilled" volunteers, especially if the trip is being solicited to unskilled volunteers?	YES	NO		
Timing				
- Does planning allow for flexibility if/when the project needs change?	YES	NO		
- Would the timing of the volunteer project potentially keep the progress of the project or other related project on hold?	YES	NO		
- If the trip is designed to be repeated, is there time allowed for potential changes to the volunteer interaction based on the assessment of previous volunteer projects?	YES	NO		

VOLUNTEER PROJECTS



5. Provide on-site project management to ensure a safe, educational, and successful volunteering environment

Execution is everything! The project needs to be well supported and well managed on the ground to ensure that the community and volunteers will benefit from the project. Basic health and safety provisions are absolutely necessary and on-site support will help to facilitate positive experiences.

INDICATORS	VALUES		EVIDENCE	NEXT STEP
On-Site Safety				
- Have health and safety concerns been addressed in advance?	YES	NO		
- Are participants made aware of all health and safety measures?	YES	NO		
- Is there a project manager on-site at all times?	YES	NO		
On-Site Support				
- Is local staff available to answer questions about the project, organization and communicate?	YES	NO		
- Are there provisions for volunteers' comfort, such as shade and potable water?	YES	NO		
Measurements of Success				
- Are volunteers provided with project goals and measurements of success?	YES	NO		
- Are volunteers educated about how their efforts contribute to the long-term goals and developments of the community?	YES	NO		

VOLUNTEER PROJECTS



6. Consider the impact of giving 'things'

Volunteers – volunteer travelers, short- and long-term volunteers – are often inclined to 'giving things'. Organizations and tour companies may also be inclined to ask volunteers to support a project through the donation of 'things'. This section is not specific to volunteer tour operators; it is relevant to all social development projects, tour organizers, and travelers who are considering engaging in philanthropic travel.

INDICATORS	VALUES		EVIDENCE	NEXT STEP
Consultation with Community				
- If any items are given, has the community or organization requested those items?	YES	NO		
- Was a needs assessment conducted before introducing any new items?	YES	NO		
Sustainability				
- Are you possibly creating an unnecessary need by introducing new items?	YES	NO		
- Are repair costs, replacement parts, and usability of items (e.g. wells, electronics), taken into consideration? (Some questions to consider: If repair is costly, who has ownership over repair responsibilities? Do those groups have access to the necessary funding?)	YES	NO		
- Has someone been trained to monitor and fix the items given?	YES	NO		
- If an item becomes broken beyond repair, are there ways for this item to be recycled or returned, or will it become unnecessary waste in the community? (i.e. the environmental impact of giving colored pencils to a school vs. plastic markers which will dry up and become non-recyclable waste)	YES	NO		
Distribution Channels				
- Are volunteers educated about the potential effects of giving food, candy, money, or other items directly to individual community members, (especially children), such as creating dependencies, reinforcing discouraged behaviors, or undermining organizational or community efforts?	YES	NO		
- Are volunteers encouraged and advised on how to give things through existing social structures?	YES	NO		
- If things are given to individuals, are there enough for all to share?	YES	NO		

VOLUNTEER PROJECTS



7. Prioritize child safety

Although many programs are promoted as supporting children, those same programs sometimes undermine the rights of children. These questions are important to ask if your volunteer programs include interactions with children for any period of time.

INDICATORS	VALUES		EVIDENCE	NEXT STEP
Vetting Partner Organizations and Projects				
- Are proper child-safety rules a priority when vetting partner organizations?	YES	NO		
- Have the emotional/psychological effects of rotating short-term care and interaction been assessed?	YES	NO		
- Does the organization allow any unannounced foreigner to visit their projects and interact with the children?	YES	NO		
- Based on the amount of support coming to the organization, do the children seem to be well taken care of to the best of the abilities of the staff? (Are there any signs that children are kept "looking poor" to attract more support?)	YES	NO		
- Will a staff member of the organization always be present when volunteers are interacting with children? (What will the volunteer to local staff ratio be?)	YES	NO		
- Are children required to perform or entertain visiting guests? (If so, how often? What do these performances entail? Can it be viewed as another form of child labor?)	YES	NO		
- For long term visitors: are background and reference checks required?	YES	NO		
- For short term visitors: are the guests monitored at all times and never allowed to be alone with a child?	YES	NO		
Educating Volunteer Participants				
- Are participants informed about the organization's policies regarding children?	YES	NO		
- Is there training, or at least information for volunteers on child rights best practices?	YES	NO		
- Are camera policies discussed regarding photographing children?	YES	NO		

||| PARTICIPANTS



8. Provide information and clear expectations for participants

The key to success for almost any trip – volunteer or otherwise – is managing participants' expectations. Educating and informing volunteers is important both for the enjoyment of their trip and how successfully they'll interact and contribute to the project and the community. Establishing realistic expectations about their experience and what they will accomplish during their volunteer project will also determine the success of the volunteer trip, for everyone involved.

INDICATORS	VALUES		EVIDENCE	NEXT STEP
Provide information for participants prior to and during their arrival				
- Are educational materials about the region/local culture, the organization, and the project given to participants before their arrival?	YES	NO		
- Is information provided regarding the social issues relevant to their volunteer project?	YES	NO		
- Are participants made aware of any cultural sensitivities, such as appropriate clothing and inappropriate behaviors?	YES	NO		
Provide clear and realistic expectations				
- Are realistic project and personal goals established and communicated to the volunteer?	YES	NO		
- Is the volunteer aware of how the short-term volunteer project contributes to the long-term goals of the organization and community?	YES	NO		
- Are volunteers prepared to place their personal needs and expectations secondary to the needs of the project?	YES	NO		
- Are volunteers prepared to be flexible to any changes or delays encountered and willing to adjust their role based on changing project needs?	YES	NO		

9. Be honest marketers

Honest marketing is essential for participants to understand the nature of the project they are signing up for and to create trust between the tour organizer, volunteer organization, beneficiary communities, and participants. Being honest about the expected impact of the volunteer project is essential. By tour and partnering organizations being honest about the organization's impact, participants can better discern the right fit for them and will not be disappointed by contrasting realities.

INDICATORS	VALUES		EVIDENCE	NEXT STEP
Provide accurate and honest information on websites and promotional materials.				
- Do promotional materials reflect realistic expectations about what can be accomplished during a short-term volunteer project?	YES	NO		
- Do the words used to describe your organization in your marketing materials accurately describe what you are providing such as "voluntourism", "ecotourism", "responsible tourism"? Is your organization's interpretation of such terms clearly defined?	YES	NO		
- Does the material state or imply that the tour operator financially supports the partnering organization when in-fact the onus for donations is left up to the guests themselves?	YES	NO		
- Are volunteers provided with accurate information on how much of there funding is going to partner projects?	YES	NO		
Respectful Marketing				
- Are there images or information provided on your site which might harm or embarrass the people or communities you are meant to be serving?	YES	NO		
- Are descriptions of places honest or are might they be ethnocentric and/or exaggerated (ie. "squalor", "desperate", etc)?	YES	NO		
- Are the opinions and contributions of local staff or local volunteers also included with the stories of foreign volunteer efforts?	YES	NO		

V RESPONSIBLE TOURISM



10. Exemplify, educate about, and promote responsible tourism

The success of any voluntourism trip requires promoting and engaging in responsible tourism. There are hundreds of organizations, blogs, articles, etc that address issues of responsible tourism. All travel service providers should become familiar with these best practices and guidelines, perhaps even more essential for those offering volunteer or philanthropic travel options. If volunteer service providers want to offer trips that positively impact local areas, discretion and thought must be put into more than just the volunteer and facilitated community interactions. Responsible operators will consider the most responsible options for travel, accommodation, traveler education, and all other aspects of the travel experience.

As a starting place, it is recommended that tour operators complete the comprehensive checklist developed by Wild Asia Responsible Tourism here: www.wildasia.net/main.cfm?page=articleID=340

VI RESPONSIBLE DEVELOPMENT

11. Exemplify, educate about, and promote development best practices

The increasing role of development organizations around the world has produced extensive research and dialogue about what “works” and which efforts have “positive” “sustainable” impacts. Tour organizers entering the voluntourism sector should be well aware of the complexities and discussions surrounding development issues and make sure to incorporate the lessons learned from those dialogs into their program designs. Some of the concepts, many already detailed above, that relate closely to the impact of voluntourism include the importance of:

INDICATORS	VALUES		EVIDENCE	NEXT STEP
- Empowering community leadership and using local power structures when implementing programs	YES	NO		
- Cultural sensitivity	YES	NO		
- Program design based on research, community needs assessment and ongoing community participation	YES	NO		
- Project monitoring and evaluation systems.	YES	NO		





Travelers' Philanthropy Handbook Underwriters

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THE LENNOX FOUNDATION



Center for Responsible Travel (CREST)

Washington, DC ■ 1333 H St., NW ■ Suite 300 East Tower ■ Washington, DC 20005 ■ P: 202-347-9203 ■ F: 202-775-0819
Stanford University ■ 450 Serra Mall, Building 50, Room 51D ■ Stanford, CA 94305 ■ P: 650-723-0894 ■ F: 650-725-0605

www.responsibletravel.org ■ www.travelersphilanthropy.org ■ info@responsibletravel.org